CASE STUDY

Gradient Builds a Proprietary Marketing Ecosystem for Independent Advisor Growth, Powered by **Snappy Kraken**

How Gradient combines its own proprietary systems, Luson Media's brand and content engine, and Snappy Kraken's technology to support independent financial services professionals with scalable marketing, advisor-level flexibility, and hands-on growth support.

Customer Snapshot:

GRADIENT FINANCIAL GROUP, LLC

Company: Gradient Financial Group

Industry: Financial Services

Company Size: **400 Advisor Offices**

Audience Served: Independent financial services professionals

Use Case: Advisor marketing support, campaign execution, scalable marketing infrastructure, content, automation, and advisor-level personalization

Solution: Gradient's proprietary marketing ecosystem (*Prizm CRM, Luson Media, Case Central, Tactical Coaching*), integrated with Snappy Kraken

Carlyn Hosking
Luson Media
Spokesperson

Overview

Gradient supports independent financial services professionals who are building and growing their own businesses. These professionals may focus on insurance, annuities, life insurance, investments, AUM, or a broader financial services model. What they have in common is the desire to operate as independent business owners while gaining access to the tools, resources, and support they need to scale.

For Gradient, marketing is not just a service. It is part of a broader business-building model that helps advisors reduce operational burden, execute more consistently, and focus more of their time on client relationships.

As Gradient evaluated marketing platforms, the team needed more than campaign technology. They needed a system that could integrate with Gradient and with Gradient's own proprietary technology — including its Prizm CRM — and support centralized marketing resources while preserving advisor independence, customization, and flexibility.

Snappy Kraken became one part of that ecosystem — a financial services-specific marketing platform that plugs into Gradient's proprietary Prizm CRM and gives Gradient's team repeatable campaigns, industry-specific content, integrated workflows, and the ability to manage marketing execution on behalf of advisors when needed.

The Challenge: Scaling Marketing Without Sacrificing Advisor Independence

Gradient works with independent financial services professionals, and that independence is central to the firm's model. Advisors need access to strong marketing support, but they also need the ability to run their businesses in a way that reflects their own brand, client relationships, and growth strategy.

Supporting marketing across approximately **400 advisor offices** created a clear operational challenge: Gradient needed a way to deliver centralized resources and hands-on support without turning marketing into a rigid, one-size-fits-all system. Each advisor business needed room for personalization, but Gradient also needed the ability to make campaign execution more repeatable and scalable.

Carlyn Hosking explained that Gradient had looked at another familiar marketing platform recognizing that it boasts a robust platform with strong enterprise capabilities. But for Gradient, the challenge was fit. Many enterprise marketing systems are designed for organizations with highly standardized brand and compliance structures — the kind of environment where advisors or agents fall under a single parent brand and follow tightly defined processes.

That was not the model Gradient wanted for its advisors.

"It's important to us that we allow advisors to have the ability to run their business as true independent advisors, but also offer the opportunity to take advantage of Luson Media, Gradient's in-house marketing firm, to offload the heavy lifting. We never want them to feel captive to us, but we want to be there for whatever help they could need, so they can focus on what matters most for them and their business."

Gradient needed a platform that could provide structure without forcing standardization. The team wanted centralized visibility and support, but also the flexibility to customize marketing for each client's unique business.

As Hosking described it, the question was: *how could Gradient adopt a marketing platform that allowed advisors to remain independent while also giving Gradient the ability to step in and manage marketing when advisors needed that expertise?*

Why Horizontal Marketing Platforms Were Not Enough

Gradient evaluated other solutions, but many were not built specifically for the financial services industry. That created another challenge: even if the technology was capable, Gradient would still need to adapt the platform to fit the realities of advisor marketing, financial services content, compliance processes, and the way independent advisor businesses operate.

For Gradient, industry fit mattered.

“There are other marketing platforms, but they’re not tied to the financial services industry. So, with them, you’re still trying to build it to fit within our industry and that’s when you run into limitations.”

Snappy Kraken stood out because it was already focused on financial services marketing. That gave Gradient access to a platform designed around the needs of advisors, not a horizontal tool that would need to be heavily adapted.

This was especially important because Gradient does not support advisors in only one area of their business. Marketing is one component of a larger support model that includes technology, education, processes, case design, and operational resources.

Gradient needed marketing technology that could fit into that broader ecosystem.

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The Solution: A Proprietary Marketing System, Strengthened by Snappy Kraken

Gradient built a repeatable marketing system for its advisors around its own infrastructure — Prizm CRM, Luson Media's creative and content production, Case Central's planning support, and Tactical Coaching hands-on training — and partnered with Snappy Kraken to strengthen the technology underneath it.

The goal was not simply to send more emails or launch more campaigns. The goal was to make marketing easier to execute, easier to support, and easier to repeat across advisor businesses.

Many advisors face the same operational challenge: they are responsible for everything. They are meeting with clients, managing operations, following up with prospects, running the business, and trying to keep marketing moving at the same time. When marketing depends too heavily on manual effort, it becomes inconsistent.

Hosking described this clearly:

“When you’re just getting into business, you’re wearing every single hat. You’re wearing a marketing hat, you’re wearing the front desk hat, you’re wearing the sales, operations and leadership hats. You’re wearing every hat.”

Snappy Kraken helps Gradient take some of that heavy lifting off the advisor’s plate. With a more connected marketing system, Gradient can help advisors execute campaigns, use content, streamline workflows, and maintain marketing momentum even when advisors are focused on client meetings and business operations.

“When you’re just getting into business, you’re wearing every single hat.”

— Carlyn Hosking, Luson Media

Integrating Snappy Kraken Into Gradient's Broader Technology Ecosystem

Gradient already had significant internal technology resources, including its own developers, its proprietary Prizm CRM, and teams like Case Central (a back-office team of CFP professionals) and Tactical Coaching (hands-on advisor training and coaching). The goal was not to replace any of that. Instead, Gradient wanted to integrate Snappy Kraken's marketing capabilities directly into their technology ecosystem.

Hosking explained that Gradient's team continues to build many of its own applications and features, while partnering with Snappy Kraken to best utilize the backend capabilities, skillsets, and marketing infrastructure Snappy Kraken has already built and refined.

"We still build a lot of our own applications and features, but we're partnering with Snappy Kraken to bring proven marketing capabilities into our technology ecosystem."

This approach allows Gradient to combine its own proprietary systems with Snappy Kraken's advisor marketing expertise. The result is a more connected experience that supports Gradient's service model while giving advisors access to proven marketing tools and content.

"...we're partnering with Snappy Kraken to bring proven marketing capabilities into our technology ecosystem."

— Carlyn Hosking, Luson Media

Supporting Advisors as Business Owners

One of the strongest parts of Gradient's model is that it supports advisors as business owners, not just users of a marketing platform.

Gradient works with financial services professionals across different stages of growth. Some are newer to owning their own business. Others are experienced professionals who have decided to build independently after years in the industry. Some may focus more heavily on insurance and annuities, while others may focus on investments or a broader retirement planning model.

Gradient's role is to help these professionals grow with the right mix of tools, resources, technology, and support.

"Our advisors want to run and grow their own businesses. We help give them through our technology, marketing support, and coaching resources to do that more effectively."

That means marketing support has to meet advisors where they are. For some advisors, Gradient may provide more hands-on execution. For others, the goal may be to help them adopt tools, build repeatable processes, and eventually manage more of their own marketing activity.

Snappy Kraken supports that flexibility by giving Gradient a platform that can serve both centralized and advisor-level needs.

"...marketing support has to meet advisors where they are."

Why Gradient Does Not Always Recommend Hiring Marketing First

For many growing advisor businesses, the first instinct may be to hire a marketing person. But Gradient often sees a better path: using Gradient's team and systems before adding internal marketing headcount.

Hosking explained that outside marketing hires may bring ideas, but they do not always understand the financial services industry, the compliance environment, or the specific stage of the advisor's business. In some cases, that can create more complexity rather than less.

"When advisors are ready to grow, hiring a marketing person is not always the best first move. Our team can bring the industry knowledge, proven processes, and execution support they need without requiring them to add additional staff before they're truly ready."

Snappy Kraken helps Gradient strengthen that recommendation. By giving Gradient a platform for content, campaigns, workflows, and scalable execution, advisors can access industry-specific marketing support without having to hire, train, and manage a marketing resource before they are ready.

"...marketing support has to meet advisors where they are."

Helping Advisors Scale From One Stage of Growth to the Next

Gradient's broader success is tied to helping advisors grow their businesses. Hosking explained that Gradient often focuses on helping financial services professionals move from earlier stages of production into larger, more scalable businesses.

That growth requires more than marketing alone. It requires coordinated support across business functions.

"Advisors are not just using us from a marketing standpoint. They're using us for all areas of their business, and Gradient has it all built-in and integrated together. And so that's what makes it all extremely unique to us."

Marketing plays an important role in that journey because it helps advisors stay visible, communicate consistently, and engage prospects and clients. But for Gradient, marketing works best when it is connected to the broader business system.

With Snappy Kraken, Gradient can strengthen the marketing component of that system while continuing to provide the broader back-office support advisors need to scale.

"Our goal is to support the client, not just from the marketing side. Our goal is to support them from every area of their business."

— Carlyn Hosking, Luson Media

Content That Reflects the Advisor's Business and the Industry

Gradient creates its own custom content through Luson Media — including advisor branding, websites, and its own radio and podcast program — tied to proprietary reports and business-specific programs. At the same time, the team sees the value in Snappy Kraken's financial services content expertise.

Because Snappy Kraken is built specifically for advisor marketing, Gradient gains access to marketing strategy shaped by what is working across the financial services industry — helping Gradient stay ahead of shifting content, engagement, and communication trends.

That matters because marketing best practices continue to change. Hosking noted that email content has shifted away from overly designed, graphic-heavy formats toward messages that feel more personal, direct, and one-to-one.

"Snappy Kraken is going to have an ongoing deep dive into what's performing versus what's not performing, so the partnership allows us to never get behind the eight ball because we know this is where Snappy Kraken focuses all of its effort."

For Gradient, that industry insight is valuable. It helps the team stay current while continuing to layer in its own custom content, advisor-specific messaging, and proprietary business resources.

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— Carlyn Hosking, Luson Media

The Impact: Turning Marketing Into a Scalable Support System

For Gradient, the value of this system is not limited to campaign execution or any single vendor. It is about offering a proprietary support model that includes — Prizm CRM, Luson Media, Case Central, Tactical Coaching, and a marketing platform strengthened by Snappy Kraken that all integrate seamlessly to help independent financial services professionals scale.

With this proprietary ecosystem, Gradient can:

- Support advisor independence while providing centralized marketing resources
- Give advisors access to financial services-specific content and campaigns
- Help advisors execute marketing more consistently
- Reduce the manual burden of managing disconnected marketing tools
- Integrate marketing into Gradient's broader technology ecosystem
- Support advisors who are not ready to hire internal marketing staff
- Use broader industry insights to improve content and campaign strategy
- Help advisors focus more time on client relationships and business growth

Most importantly, Snappy Kraken helps Gradient deliver marketing support in a way that fits its larger initiative to help independent financial services professionals grow stronger, more scalable businesses.

Final Takeaway

Gradient needed more than a marketing platform. It needed a system that could support independent advisors as business owners — with the right balance of centralized support, advisor-level flexibility, financial services expertise, and scalable execution.

Gradient's own systems — Prizm CRM, Luson Media, Case Central, and Tactical Coaching — bring that vision to life, with Snappy Kraken strengthening the marketing technology underneath it.

By combining Gradient's advisor-first support model with Snappy Kraken's financial services marketing platform, Gradient is building a more repeatable way to help advisors market consistently, grow confidently, and maintain the independence that makes their businesses their own.