

C A S E



S T U D Y



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*Snappy Kraken has been successful for me from the get-go. They're exactly what I need to engage clients, ask thought-provoking questions, and help them build and grow.*

*Hannah Buschbom*

Financial Advisor  
The AmeriFlex Group

How **Snappy Kraken** helped

# AMERIFLEX FINANCIAL

**Save** 10-15 Hours of  
Marketing Every Month



**DYNAMIC CONTENT**

that goes beyond the traditional

AmeriFlex is an advisor-owned firm that provides a full range of investment and wealth management services with a focus on managing risk and growing your wealth.

## HIGHLIGHTS

### Challenges

● Converting leads into clients with fresh, relevant, and exciting content

● Getting industry approval quickly enough for content to remain timely

● Avoiding "information overlap" with competitors in the same region

# Challenges

## Turning warm (or cold) leads into paying clients

Hannah Buschbom is a Financial Advisor with The AmeriFlex Group, an independent RIA based out of Las Vegas. She works from the group's Santa Barbara office and gets most of her clients through referrals from CPAs, attorneys, and risk management professionals.

Hannah had leads, but she didn't have a solid strategy for turning them into clients.

*"I had a bunch of lukewarm leads that were referred to me by word-of-mouth or through an email introduction. But they would never book appointments," Hannah explains.*

Hannah knew that nurturing prospective clients with content would be key. But she didn't want to send the same old canned email newsletters and social media posts to engage any of her contacts - including leads, existing clients, and referrals.

Then, Hannah discovered Snappy Kraken through a referral from an investment provider.

*"I came to Snappy Kraken with a long list of people I wanted to build relationships with," Hannah says. "But I didn't want to send them the same basic, boring information that everyone else provides. I didn't want to give them information they could find themselves using Google, like 'Should you open a Roth 401k?'"*

Hannah didn't want to annoy her contacts with content that wasn't actually interesting either - or tailored to their specific needs.

Plus, the economic impact of the COVID-19 crisis only increased the challenge of providing fresh, interesting information.

*"You've got to stay relevant and considerate right now. People are just worried about putting food on the table. It's a little tone-deaf if you're not acknowledging the struggle," Hannah explains.*

An additional challenge of creating content was getting it industry-approved in time for it to still be relevant.

*"Personal finance is a highly regulated industry. Trying to come up with content that gets through compliance quickly is tricky," Hannah explains. "I'd find an article that I found interesting and submit it to compliance. But by the time it was approved, the article was no longer timely."*

Bottom line? Hannah needed a simple strategy that would help her build relationships with fresh, original insights and knowledge.

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## Solution

### An automated marketing system with thoughtful, pre-approved content

With Snappy Kraken, Hannah was thrilled to discover just the kind of content she needs to actually engage her leads and other contacts.

*“I was so excited to find that Snappy Kraken could help us offer this vivacious, dynamic content that’s different from what traditional financial services talk about,” says Hannah.*

Snappy Kraken’s campaigns aren’t just fresh and original, however. They’re also relevant to current events - such as the COVID-19 crisis - helping Hannah to engage her prospective clients in authentic conversation.

*Hannah continues, “I picked out an email campaign with the subject line, ‘Is the sky really falling?’ That was super thought-provoking and started a real conversation with my leads - especially in light of COVID-19.”*

As for the body of the email itself?

Hannah loves that Snappy Kraken’s content balances technical expertise with effective marketing.

*“The content combines valuable factoids with great copy and beautiful graphics,” says Hannah. “It manages to communicate, ‘I’m a subject matter expert’ without getting overly technical.”*

Part of the reason Snappy Kraken’s content successfully straddles this line is that it’s formatted and created by an actual marketing team. That means that Hannah gets the benefit of having strategic decisions made for her - such as graphic and CTA placement and cadence.

## HIGHLIGHTS


### Solution

Dynamic, relevant campaigns with unique insights and click-worthy topics

Pre-approved content that’s industry compliant

An easy-to-use system for segmenting campaigns

Attention-grabbing content that wasn’t watered-down



*“Snappy Kraken clearly understands this industry. They understand what Financial Advisers need....and how to perfectly blend information and visuals, and engage our readers,” Hannah explained.*

By using Snappy Kraken Hannah also gets to skip the time-consuming step of making sure her content is compliant. All their content is pre-approved - meaning she can send out timely content without an administrative headache or delay.

*“The fact that everything is pre-approved makes my life a lot easier. I can get content up and running without the steps required for industry approval.”*

Snappy Kraken also provided Hannah the segmentation and tracking tools she needed to send content to the right person, at the right time.

*“With Snappy Kraken, I have a system that tracks my prospective clients, referral partners, and existing clients. They make it easy to stay organized and send targeted campaigns,” Hannah says.*

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*“I was so excited to find that Snappy Kraken offers this vivacious, dynamic content that goes beyond what traditional financial services talk about.”*

## HIGHLIGHTS

### Results

● Email marketing that used to take 10-15 hours/mo is now down to 3-4 hours/mo

● Immediately closed two leads who had previously gone cold—an exciting win that more than covered the first year costs of the platform

● No more worrying about regulated content taking weeks to gain approval

## Results

### Leads turned into valuable clients after just one campaign

By having her content pre-approved, Hannah is skipping a significant delay - meaning she can send out her campaigns ASAP.

*“We’re a highly-regulated industry. So trying to come up with content that would get through compliance quickly was a challenge. It typically takes a week of waiting to make sure content is compliant. The fact that all of this is preapproved and it’s super easy to implement makes my life a lot easier,” Hannah explains.*





In fact, using Snappy Kraken requires only 3-4 hours a month of labor for Hannah.

*"I spend three to four hours every month cleaning up my database, segmenting different contacts, and then actually launching the campaign," says Hannah.*

That's a minimal amount of time to put into a service that delivers fresh, insightful content that has helped Hannah to see immediate, lucrative results.

In fact, it took just one email campaign to turn two formerly cold leads into valuable new clients that more than covered the cost of Snappy Kraken for an entire year - a pretty extraordinary ROI.

*"I had two prospective clients who went completely cold on me," says Hannah. "As soon as I sent my first Snappy Kraken campaign, they turned into actual clients. The best part? They more than covered the costs of using Snappy Kraken for the year."*

Snappy Kraken content has not only covered its own cost up front: it continues to help Hannah reach her goal of starting conversations with her contacts.

Clearly, Hannah's leads and other contacts appreciate the fresh, insightful new content that she's sending out. And that's helped her to develop a reputation without spending hours on curating content.

*"My clients and prospects think I'm a genius, which is the best kind of problem to have," explains Hannah, laughing. "It looks like I've spent all this time coming up with a really thought-provoking email, when I've really just clicked a couple buttons."*

and helps Hannah to continue setting herself apart from the competition.

*"Everybody's trying to differentiate themselves right now...and Snappy Kraken has given me something to say during COVID-19," says Hannah. "I would have paid thousands of dollars for that."*

Thankfully, Hannah didn't have to. Snappy Kraken is a cost-effective and low-risk strategy for maintaining contact.

*"I don't have to worry anymore about whether I'm reaching out enough," says Hannah. "I used to wake up in the middle of the night and ask myself, 'How am I going to convert a prospective client?' or 'What's going to be that thing that brings them over the line?'"*

With Snappy Kraken, Hannah has the answers to those questions.

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# **UN-CANNED MARKETING FOR FINANCIAL ADVISERS WHO WANT TO STAND OUT.**

*See How Snappy Kraken Can Help  
You Stand Out.*

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