



Driving Engagement as an Advisors Excel Firm

Chris Mediate, Mediate Financial Services, Inc.



Inside the Mind of an Advisors Excel Advisor and Marketer

Ever wonder what happens when a financial advisor doubles as a marketing leader? For Chris Mediate, Financial Advisor and Director of Marketing at Mediate Financial Services Inc., it means building a system that keeps clients engaged, confident, and informed—long after meetings end.

Mediate Financial is built on a simple philosophy: clients deserve comprehensive, ongoing support, not fragmented advice. The team helps with everything that touches a client's financial life, from retirement planning and rollovers to tax strategy and income planning.

Equally important is the personal connection. The team takes time to understand each client's goals, values, and areas where guidance can make the biggest impact. Education plays a central role, empowering clients to make informed decisions even during market uncertainty.

"We don't like to disappear," says Chris. "We want clients to know we're here to help. We want to be someone they can rely on."

To deliver on this promise, Chris combines real client conversations with data driven insights inside Snappy Kraken, creating a marketing system that makes communication consistent, measurable, and relevant across email, social media, and digital messaging.

At the heart of the strategy is one belief: clients want more than transactional advice. They want education, consistency, and confidence—and a firm that shows up, every time.

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Wearing Two Hats: Marketing Leader and Financial Advisor

As both Director of Marketing and a practicing Financial Advisor, Christopher Mediate brings a rare and valuable perspective to the firm. He began in an entry-level marketing role and quickly helped reshape the firm's marketing approach, building a structured strategy and challenging outdated methods. He credits adopting Snappy Kraken in 2021 to making this transition a reality.

“ Snappy Kraken helped us close a major communication gap. The consistent touch points kept us top of mind and gave us a way to stay connected outside of in-person events. The automated emails and content library made it easy to stay top of mind, especially between in-person meetings. ”

Today, he balances strategic oversight with day-to-day execution. Ensuring marketing initiatives stay on track while also working directly with clients in a multigenerational firm. This dual role allows marketing decisions to be grounded in real client conversations, while client education is reinforced through thoughtful, and well-timed marketing.







Defining Success: Trust, Engagement, and Measurable Momentum

At a high level, Chris measures success on how clients feel. *“When clients feel valued, supported, and confident that they can access the team when needed, the strategy is working.”*

Having seen the full client journey firsthand, he’s watched clients leave meetings feeling more organized, more supported, and more confident in their financial direction. *“To me this is what it’s all about, shaping their financial futures in a way that makes clients feel confident and at peace.”*

Christopher doesn’t just rely on customer feedback to gauge whether his marketing is working he reinforces that success by easily reviewing performance data directly within Snappy Kraken, giving him clear visibility into what’s resonating.

Key performance indicators include:

-  Email engagement, open rate, and click activity
-  Social content reach and interaction
-  Website traffic and online visibility
-  Appointment volume tracked month-over-month and year-over-year

“The ability to segment audiences and understand where leads originate in Snappy Kraken has made it easier to deliver relevant content and maintain consistent communication touch points that keep the firm top-of-mind. Analyzing top performing content pieces allows us to better understand our audience too. If it’s content they are engaging with we work to include it more often.”



Before Snappy Kraken: Inconsistent Touch points and Missed Opportunities

Before implementing Snappy Kraken, the firm's biggest challenges were maintaining consistent communication and having a scalable content library to support it. While referrals and events were effective, there was little structure in place to stay meaningfully connected with prospects and clients between in-person interactions.

That gap wasn't just internal. They consistently heard across the industry that many investors hadn't heard from their advisor in a year or more, reinforcing their belief that consistent communication is **a core responsibility** of an advisor, not a "nice to have."

The firm had experimented with basic marketing tools, but they fell short. There was no robust content library, messaging lacked depth, and nothing was built to scale. The team felt they spent too much time creating materials from scratch rather than focusing on strategy, engagement, and client relationships.

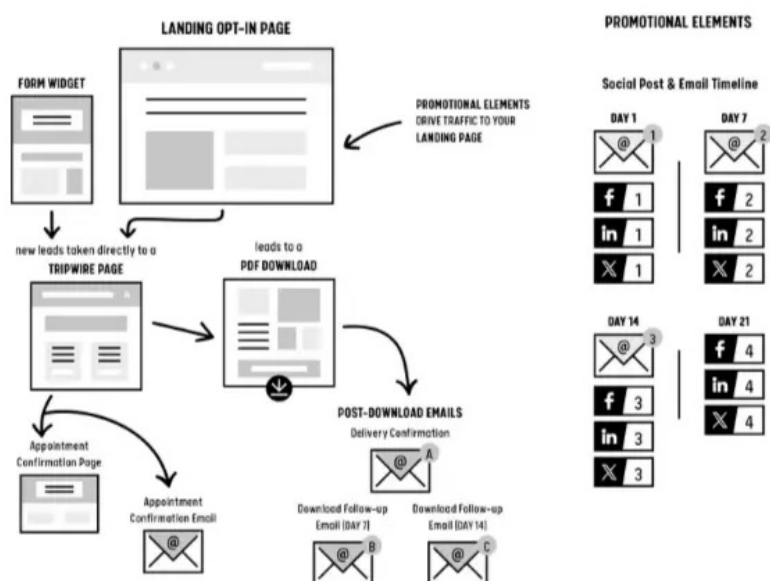
“Having Snappy Kraken’s educational content to go off of as an anchor is huge. Because without that, you would have to be sit down and come up with all of that content on your own. You’d have to develop newsletters, landing pages, emails and especially me being the only person here to dictate our marketing strategy, that would be a lot of work and it would take away from my ability to focus on strategy and working with clients.”



Implementing Consistent Communication

- 01 The firm recognized they had people in their database for years who weren't hearing from them regularly. While they excelled at in-person meetings and events, there was a clear opportunity to stay visible and valuable *between* those moments.
- 02 Snappy Kraken enabled consistent, intentional touch points that allowed the firm to reconnect with their full database, not just those actively engaged. This approach led them to launch a targeted re-engagement campaign designed to reintroduce value and reopen conversations with contacts they hadn't heard from in some time.

The results stood out. Open rates were not only strong among re-engaged contacts but also exceeded industry average open rates. As a result, the firm has seen increased conversion rates and higher referral activity, driven by steady communication and content that consistently reinforces credibility, education, and trust over time.



The Data

9,863

Emails sent

26%

Open rate

14%

Conversion rate







Discovery & Decision: Choosing a Better Way to Stay Top-of-Mind

Mediate Financial learned about Snappy Kraken at an Advisors Excel conference in 2021, and the team began exploring how it could elevate their marketing efforts.

They recognized the value of a platform built exclusively for the wealth management industry by professionals who understand the day to day realities of advisory firms. With built in compliance workflows ready out of the box, Snappy Kraken could centralize marketing efforts, deliver high quality content, and support consistent outreach without adding unnecessary complexity or risk.

Early Impact: Stronger Communication, Less Manual Work

After onboarding, improving communication became an immediate focus. Snappy Kraken quickly became a core pillar of the firm's marketing strategy, helping the team:

-  Maintain consistent touch points beyond in-person meetings
-  Elevate the quality and professionalism of their messaging
-  Leverage a content library without starting from scratch
-  Automate outreach while keeping it relevant and timely

Email campaigns became a reliable way to reinforce the firm's value and remind prospects and clients who they are and how they help.



Results: Increased Engagement and Faster Lead Conversion

Since adopting Snappy Kraken, the firm has built an always-on marketing engine designed for consistent, long-term engagement. Over time, marketing efforts have reached **more than 3,000 contacts** through **hundreds of social posts** and **over 460,000 emails sent**, generating **nearly 180,000 opens** and an open rate close to **40%**. This sustained visibility has translated into strong audience action, driving **close to 90,000 clicks**, **nearly 87,000 landing page views**, and **almost 3,000 form submissions**. The cumulative impact highlights how steady, multi-channel communication can reliably move prospects from awareness to meaningful conversion.

3,000+
contacts
reached

300+
social posts
published

460,000+
emails
sent

Nearly 180,000
email opens
(\approx 40% open rate)

Close to
90,000 clicks

Nearly
87,000 landing
page views



Key Takeaways & Advice for Marketing Professionals and Advisors

The biggest lesson: consistency compounds.



“ We constantly remind clients that short-term pain is often necessary for long-term gain. That philosophy shouldn’t stop at investing, it should apply to how you grow your firm. Marketing requires consistency, patience, and ownership. You need to know what’s working, benchmark your progress, and have someone staying on top of it. The results don’t happen overnight, but when you commit long term, it pays off. ”

