Data Meets Marketing: 3 Proven Workflows to Help Accelerate Growth

A step-by-step playbook for turning enriched data into powerful, automated marketing

CATCHLIGHT® & SNAPPY KRAKEN

Introduction: Why Data-Enriched Marketing Wins

The competition for quality leads has never been more intense. Catchlight's 2025 Annual Report reveals a stark reality: 68% of advisors are now competing for the same leads—up dramatically from just 47% in 2022.[1]

At the same time, research shows that 78% of buyers purchase from the first responder.[2] In this environment, generic marketing approaches and slow follow-up are competitive disadvantages you can't afford.

Most advisors are sitting on a goldmine of untapped potential—lists of leads and clients that could be high-value... if only you had the right data to know who's who, and the right system to market to them quickly and consistently.

That's where Catchlight and Snappy Kraken come in.

Catchlight helps you uncover critical insights—like estimated investable assets, income range, and possible life events—so you can prioritize and segment smarter. Snappy Kraken turns those insights into action with automated, targeted marketing campaigns that nurture leads and help grow AUM.

Together, they could give you a repeatable way to:

- Spot your ideal opportunities (even in a cold database)
- Personalize your marketing without manual work
- Automate follow-up from day one

This guide is your recipe book. Inside, you'll find three proven workflows used by firms to help boost conversions, increase revenue, and scale growth—faster.

Let's dig in.

1 - Source: Catchlight - Organic Growth Trends Annual Report 2025

2 - Source: LeadCenter

Workflow 1: Segment Smarter to Nurture Better

Use case: Re-engage cold leads or re-segment your existing CRM to boost relevance and results.

Your CRM is probably full of contacts who haven't engaged in a while—or ever. The problem isn't always the leads themselves. More often, it's the lack of data that prevents you from knowing who's actually a good fit and what kind of message will resonate.

With Catchlight and Snappy Kraken, you can breathe new life into these lists.

1. Select a list

Choose a group of dormant leads, past event attendees, or older prospects in your CRM.

2. Enrich the contacts with Catchlight

Run a batch enrichment to uncover:

- ◯ Estimated investable assets
- ◯ Estimated income range
- ◯ Their likelihood to convert and pay for financial advice
- ◯ Projected Client Revenue

3. Create new audience segments

Based on Catchlight and exisiting CRM & marketing automation data, organize your contacts into meaningful groups—e.g.:

- ◯ HNW retirees
- ◯ Pre-retirees with high income but low AUM
- ◯ Mid-career professionals with wealth accumulation potential

4. Launch targeted Snappy Kraken campaigns

Choose marketing campaigns that match the interests and life stages of each group:

- ◯ Retirement Success for retirees
- ◯ Hidden Tax Strategies for HNW professionals
- ◯ Business Owner Exit Planning for business owners

5. Let automation (and data) take it from there

Once you launch your campaigns, Snappy Kraken handles the delivery—sending emails, social posts, and landing pages automatically. Then, in the Marketing Hub, you can see which contacts are engaging and prioritize your outreach based on real-time activity. It's a smarter, more scalable way to follow up.

The Outcome:

Better segmentation = better engagement. Instead of generic blasts, your leads can receive content that's personalized, relevant, and timely—improving response rates and setting the stage for more conversions.

Workflow 2: Find Hidden AUM in Your Book

Use case: Enrich your existing client base to identify overlooked growth opportunities.

You already have relationships with clients—but how well do you really know their full financial picture?

Most advisors are only managing a portion of their clients' assets. Catchlight helps you uncover what's held away, while Snappy Kraken gives you the tools to engage those clients with campaigns designed to bring more AUM under your umbrella.

1. Pull your current client list

Start with your full book of business—or focus on clients you suspect have additional assets.

2. Enrich each client with Catchlight

Use enrichment to reveal:

- ◯ Estimated investable assets
- ◯ Estimated income range
- ◯ Their likelihood to convert and pay for financial advice
- ◯ Projected Client Revenue

3. Spot the gaps

Look for mismatches—like clients with high predicted assets but low managed AUM. These can be the hidden opportunities.

4. Segment and engage with Snappy Kraken campaigns

Use targeted campaigns to open up new conversations:

- ◯ 401(k) Rollover campaign for held-away retirement funds
- ◯ Estate Planning Mistakes and How To Avoid Them for HNW families
- ◯ 6 Pillars of Wealth Management for HNW Investors for high earners

5. Track results and reach out through the Marketing Hub

Use Snappy Kraken's Marketing Hub to:

- ◯ See who's opening, clicking, or replying
- ◯ Get automatic alerts when clients engage
- ◯ Reach out 1:1 with timely, relevant follow-up—without switching tools

The Outcome:

You're not just running campaigns—you're surfacing hidden revenue opportunities, engaging the right clients, and using real-time data to follow up at the right moment.

Workflow 3: Automate Your Follow-Up from Day One

Use case: Win the speed-to-lead race by capturing new leads, enriching them instantly, and triggering personalized campaigns without manual work.

The competition for leads has intensified[1] dramatically—68% of advisors now compete for the same leads, up from just 47% in 2022. In this crowded landscape, research shows that 78% of buyers[2] purchase from the first responder.

Most firms put tons of effort into getting new leads... and then drop the ball when it comes to follow-up. Generic drip emails or delayed responses are still the norm, but when you're competing with multiple other advisors for the same prospect, speed-to-lead isn't just nice to have—it's make-or-break.

The difference between responding in minutes versus hours (or days) can literally determine whether you win or lose a prospect to a competitor.

With Catchlight and Snappy Kraken, you can build a smarter front door: one that instantly learns about your leads, sorts them based on what matters, and launches the right campaign automatically—all within minutes of a lead opting in.

This workflow helps ensure you're not just fast, but fast and relevant, giving you the best chance to be that crucial first responder while delivering personalized value from the very first touchpoint.

(1) Source: Catchlight - Organic Growth Trends Annual Report 2025
(2) Source: LeadCenter

1. Automate your lead capture in Snappy Kraken

Use the AI Lead Capture tool to instantly pull new leads from any source (no integration or manual entry required). Any data you have on that lead will be added as well.

2. Automatically enrich each new lead with Catchlight

As leads come in, Catchlight adds data to each record:
- Estimated investable assets
- Estimated income range
- Their likelihood to convert and pay for financial advice
- Projected Client Revenue

3. Auto-add to the right groups—based on both data and source

For example:

- A high-income lead from a "Tax Webinar" might go to a group for High Earners
- A retiree from a referral form might be grouped into Pre-Retirees

4. Auto-subscribe each group to a relevant campaign

Each group is automatically connected to a campaign relevant to their needs—no manual tagging or assigning required.

5. Monitor results and refine using the Marketing Hub

As campaigns run, the Marketing Hub can give you clear insights into which leads are opening, clicking, and ready for follow-up—so you can strike while the iron's hot.

The Outcome:

Every new lead is segmented, enriched, and nurtured—automatically and instantly. You can win the speed-to-lead race by being first to respond with personalized, relevant messaging, while saving time and increasing conversions in an increasingly competitive market.

Putting It All Together: From Insight to Action

When you combine Catchlight's enriched data with Snappy Kraken's automated marketing engine, you get more than just better segmentation—you get a system for predictable growth.

Here's what each workflow helps you achieve:

- **Workflow 1:** Turn outdated lists into new opportunities with targeted campaigns
- **Workflow 2:** Unlock hidden AUM from your current clients and grow wallet share
- **Workflow 3:** Automate personalized nurture from the moment a lead opts in

Each one is simple to set up—and powerful once it's running.

Need help getting started? Reach out to your account rep:

Catchlight: hello@catchlight.ai
Snappy Kraken: marketing@snappykraken.com

Ready to Take the Next Step?

Prioritize Snappy Kraken prospects and engage with them effectively.

Access Catchlight enrichment data directly within Snappy Kraken's marketing automation platform so you can prioritize, nurture, and convert your highest value prospects systematically.

Snappy Kraken's automation engine and Catchlight's prospect intelligence work together to deliver immediate follow-up, ongoing communication, and long-lasting relationships.

Target high-net-worth prospects by creating audiences based on net worth and AUM potential

Automate personalized campaigns based on wealth indicators with one click

Segment and personalize outreach so prospects receive relevant, high-impact messaging

Use built-in engagement tracking to identify and nurture your most interested leads

New to Catchlight?
Click here to book a demo:
catchlight.ai/book-a-demo

New to Snappy Kraken?
Click here to book a demo:
snappykraken.com/catchlight

Already a customer of one or both platforms? Use this guide to implement your first workflow today—or reach out to your rep for hands-on support.

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