

C A S E



S T U D Y



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*Snappy Kraken's consistent drip of awesome content makes us look top notch to our followers and subscribers. The first automated campaign secured a new High Net Worth client—that's the ROI you can get when you send the right content to the right person at the right time.*

*Michael H. Baker*

Manager & Founding Partner  
Vertex Capital Advisors

How **Snappy Kraken** helped

# VERTEX CAPITAL ADVISORS

**Automate** Marketing & **Grow** Their Practice



**90% LESS TIME**

Spent on Content Creation



**HIGH NET  
WORTH CLIENT**

From first campaign

Vertex Capital Advisors® is an independent financial services firm located in South Carolina. Investment advisory and financial planning services offered through Advisory Alpha, LLC, a SEC Registered Investment Advisor. Insurance, Consulting and Education services offered through Vertex Capital Advisors. Vertex Capital Advisors is a separate and unaffiliated entity from Advisory Alpha, LLC.

They specialize in creating personalized retirement plans with honesty, transparency, and reliability—matched with the right mix of investment and insurance products.

## HIGHLIGHTS

### Challenges

Struggling to make time for content creation necessary for brand building

Existing automated campaign solutions felt like corny, canned content

Automating FINRA-compliant content without sacrificing quality

# Challenges

## Time poor financial advisors look for quality marketing automation

As a Manager and Founding Partner of Vertex Capital Advisors®, Michael had the sole responsibility for developing marketing content to drive new leads and engage existing clients. Like many advisors, time was his most precious commodity. He knew the importance of quality content online—with email as a priority channel—but business growth demanded his attention over consistent content creation.

*“We were growing at a pace that made it difficult for me to keep up with getting emails out the door,” he says. “I wanted to be writing, but my mental energy was going into planning and client strategy.”*

Michael knew they needed support to maintain a consistent marketing presence for their growing email list—a turn-key solution they could use under the Vertex Capital Advisors® banner. His criteria seemed simple: get back his time and automate without losing content quality.

*“I could keep going the way I was, feeling completely burnt out by keeping up with content—or I could get some help.”*

But he found that existing turn-key marketing providers in the financial services space were producing poor quality content for advisors. The content options he explored didn’t connect with the client in the way his emails needed to, and lacked a commitment to building long-term relationships.

*“For some firms, the canned and corny content might be fine,” says Michael. “Our approach to prospecting is more like gardening than hunting, sowing seeds with consistent and useful emails in their inbox. But we were really struggling to find something that delivered on that quality.”*

Michael didn’t want to compromise on an automated solution that saved time but didn’t provide quality content. He knew Vertex Capital Advisors® needed an automated solution that was a cut above their competitors. He wanted a team that could create compliant content their subscribers actually wanted to read.

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# Solution

## Quick and simple customized content

Michael heard about Snappy Kraken through industry contacts. He did his research on their approach to marketing automation, and he was impressed by their commitment to grow and improve their deliverables. It was the first solution he looked at that felt like the content was high quality and could be truly automated.

*"When I looked into Snappy Kraken, I was struck by their energy—I want to work with people who are cutting-edge thinkers. It was more than the strategy; their visuals matched the energy of the content, and their emails had some life to them."*

The Snappy Kraken platform gave Vertex Capital Advisors® access to a library of financial services content ready to personalize for the Vertex Capital Advisors® brand. Campaigns are produced in house at Snappy Kraken by an expert content team—an average of 128 hours is spent on research, writing, design, testing, and automation for each campaign. The library includes content that's compliant with financial watchdog FINRA guidelines to protect investors, saving time on internal compliance reviews.

*"Even if I had time to write something myself, it still had to go back and forth with our compliance department. Now, that's packaged up and done for me."*

From the first contact with Snappy Kraken, Michael was guided by a success specialist to choose and customize content and campaigns to suit his audiences.

*"It was hands-on from the start. Each month they'd walk me through campaigns and content, and we'd tweak them on the spot so I'd go away with a month's worth of quality content ready to go. They were invested in making sure we implemented the tools—not in signing us up and ignoring us."*

Michael knew Snappy Kraken's automation could cut down time spent on content, but he wasn't sure there would be ROI he could measure.

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## HIGHLIGHTS

### Solution

Selected Snappy Kraken for its impressive strategy, visuals, and quality content library

Guided by a success specialist to select and personalize campaigns

Snappy Kraken was the first solution that could truly automate compliant content

# Results

## Snappy Kraken helps automate marketing and grow their practice

Michael didn't expect to see results from Snappy Kraken before six months—so he was floored when they engaged with a new High Net Worth client on their first automated campaign.

Since implementing Snappy Kraken, Michael has automated multiple campaigns to run simultaneously to meet different audience needs. With email marketing and newsletters as the primary channel, segmented audiences are sent relevant content at the right time.

*"It's as simple as choosing campaigns from the library that match your goal. We have automated campaigns running for our existing clients, 90-day onboarding email sequences, and slow-drip sequences for active or passive prospecting."*

Access to metrics across email opens, clicks, and engagements is helping identify content that appeals to the different audience segments. Michael says people engage with the emails, and their consistency removes any fears about contacting him directly.

Creating time for content creation and campaign strategy used to be a struggle. But with Snappy Kraken, the process that used to eat up hours is now done in 90% less time.

*"What's harder to measure is the mental energy I used to spend on it. Working with Snappy Kraken is like adding a marketing person to our team. We choose the campaigns, it's simple to get up and running, and then we're set for the next month's worth of communication."*

A new perspective on time-saving marketing automation helps redefine what success looks like for Vertex Capital Advisors® as they grow their lifestyle advisor practice.

*"With Snappy Kraken's support, we're thriving as a business and living the life we want—which mirrors our approach to planning our clients' retirement."*

## HIGHLIGHTS

### Results

First automated campaign helped close a new High Net Worth client

Monthly content creation in 1 hour instead of 10

Audience segmentation for simultaneous campaigns under the Vertex Capital Advisors brand

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# WHAT WOULD YOU DO WITH **MORE TIME** IN YOUR DAY?

*See what Snappy Kraken's automated marketing could do for your practice.*

REQUEST A CALL BACK

