



From Dormant Database to Scalable Growth Engine

At a Glance

Len Martinez had thousands of valuable contacts sitting in old spreadsheets, client notes, and past campaign lists. Some went back 10 or even 20 years.

The problem was not the list. It was the lack of a scalable way to stay in touch.

With Snappy Kraken, Len and his team turned that scattered database into a consistent communication engine—one that now supports email, social media, custom video campaigns, timely content, and long-term nurture.

The impact:

4,000+ contacts organized and nurtured	785.5K emails sent	216,432 email opens	41,000+ clicks
37,000+ landing page views	440+ form submissions	380+ social posts published	

Now, prospects who first met the firm years ago are re-engaging, booking appointments, and starting conversations that may have otherwise been lost.

Turning Years of Dormant Contacts Into a Scalable Marketing Engine

For more than 20 years, Len Martinez has built his firm around helping clients navigate one of life's most important transitions: retirement.

His team specializes in working with people who are planning for retirement or already moving through it. As Len explains it, many people spend their working years climbing the mountain—accumulating wealth, raising families, and trying to build the nest egg they'll need. But once they reach the top, the conversation changes.

Instead of asking, "How do I build more?" they begin asking, **"How do I keep what I've saved? How do I create security for this week, next year, and 20 years from now?"**

That is where Len and his team do their best work.

"We've been able to understand very, very clearly what people's challenges are," Len said. **"And we've been able to learn and apply the best approaches to help them with that."**

Len serves as the firm's advisor and primary producer, working directly with clients to understand their needs and help solve the financial questions that matter most. Behind him is a team that keeps the business moving—including Veronica Reeves, who manages much of the firm's social media and marketing execution.

Together, they are focused on building lasting, win-win relationships with clients. For Len, success is not simply another appointment or transaction. It is when clients begin to include him in personal financial conversations, ask for guidance on major life decisions, and refer their adult children.

"That's when I can tell we've really developed that next-level relationship," Len said. **"They feel like they can contact me at any time."**



The Challenge: Manual Marketing That Created a Ceiling on Growth

Before Snappy Kraken, Len's marketing process was highly manual, ad hoc, and a challenge to scale.

His team had thousands of contacts gathered over the years from workshops, campaigns, spreadsheets, and client notes. Some records were 10 years old. Others dated back 20 years. But while the list was valuable, there was no easy way to communicate with everyone consistently.

At first, Len tried sending email campaigns manually. Then Google limited how many emails he could send at once. He broke the emails into smaller batches, but eventually that approach became unworkable, too.

The team later moved to **Constant Contact**, but the process was still manual. They could send basic written communications to a few hundred people, while thousands of other contacts remained untouched.

"We were going out to maybe 200 or 300 people while I had another 2,500 or 3,000 contacts in all of my databases," Len said.

Marketing happened one touch at a time, one conversation at a time, and one prospect at a time. There was no reliable system for staying top-of-mind with the full database, nurturing older contacts, or reaching people at scale with timely and relevant messages.

"It was stymying our ability to grow and scale," Len said. **"It was kind of one person at a time, one touch at a time, one conversation at a time."**



The Decision: A Trusted Recommendation for Scalable Marketing

Len first discovered Snappy Kraken through InsurMark, now part of Simplicity, which had made the platform available through its internal portal.

The placement alone caught his attention. Snappy Kraken was positioned alongside other essential advisor tools, which signaled that it was not just another marketing vendor—it was something his trusted partners believed advisors needed.

“They basically said, ‘Look, this tool is for you. You need it. We have it. We’re integrating it into our system.’”

That endorsement mattered. Len trusted InsurMark’s business perspective, and their recommendation helped him see how Snappy Kraken could support the kind of consistent, scalable communication his firm needed.

At the time, Len was not looking for another disconnected marketing tool. He needed a practical system his team could trust, adopt, and use as part of the firm’s broader growth strategy.

With InsurMark’s guidance, the opportunity became clear: Snappy Kraken could give the firm a central platform to organize contacts, deliver timely campaigns, and maintain long-term relationships.

From there, the question became simple: how quickly could they get the system loaded?



The Solution: A Reliable Repository for Reaching Everyone

Once the team implemented Snappy Kraken, they took on the work of consolidating their contact database.

Over several months, they loaded every contact they had into the platform. That included names from old spreadsheets, campaign lists, and decades-old client notes. The process required effort, but it unlocked something the firm had never had before: a reliable way to communicate with the entire list.

“ Now we’re staring at 2,500, 3,000 people that we can, in a matter of five minutes, communicate with... And that’s pretty amazing. ”

—Len Martinez

With Snappy Kraken, the team can now send communications that are timely, topical, or simply fun. Instead of letting older leads and contacts sit dormant, they can keep the firm’s name, voice, and perspective in front of prospects.

For Len, Snappy Kraken has become the place where the firm’s marketing efforts ultimately live.

“ Snappy Kraken is, in my mind, from a business perspective, the end game where everything goes to live,” he said. **“It creates evergreen for us. ”**

That matters because a message sent today can continue working long after it goes out. An email may sit in someone’s inbox, get forwarded, or become the spark for a future conversation years later.



The Workflow: Custom Campaigns, Timely Content, and Multi-Channel Reach

The firm began using Snappy Kraken more intentionally, shifting marketing from occasional outreach to a consistent communication strategy.

From Len's perspective as CEO and advisor, Snappy Kraken gave the firm a reliable way to stay visible with clients, prospects, and long-term contacts without relying on one-off manual efforts.

It created a central system where the firm's message could live, be distributed, and continue working over time.

For Veronica Reeves, who supports the firm's marketing execution, the value is more practical and day-to-day. Her role began with social media support and expanded into campaign coordination, follow-up, and multi-channel communication. Snappy Kraken gave her a platform to bring those efforts together across email and social media.

“ One of the features that I find valuable is the ability to run our own campaigns inside the platform. We can plug in a quick video of Len's, add a little bit of information to it, and get it out to everybody quickly. ”

—Veronica Reeves, Marketing Professional

The team also values having timely campaign content available when market events, planning topics, or trending conversations create a reason to communicate.

“I really like the fact that there are campaigns available that are very quick with what's going on in the world or something trending. It's out there and available to us right when we need it.” - Veronica Reeves.

Together, Len and Veronica use Snappy Kraken to connect strategy and execution: Len focuses on the firm's voice, client relationships, and growth direction, while Veronica has the tools to turn that strategy into consistent, multi-channel communication.



The Results: A Stronger Foundation for Scalable Marketing

Since implementing Snappy Kraken, Len's team has built a more scalable and reliable marketing foundation—one that allows them to consistently reach thousands of contacts across email, social media, and landing pages.

To date, the firm has:

Grown its database to **4,000+ contacts**

Published **380+ social posts**

Sent **785.5K emails**

Generated **216,432 email opens**, representing a **27.6% open rate**

Driven **41,000+ clicks**

Generated **37,000+ landing page views**

Collected **440+ form submissions**

Beyond the numbers, the firm has seen a meaningful shift in how prospects engage. Len described moments where someone schedules an appointment, and he does not immediately know who they are, only to discover that they first met years ago or had been receiving the firm's emails over time.

“Someone is setting an appointment with us, but I haven't met them yet,” Len said. **“That didn't happen before using Snappy Kraken.”**

For the team, those conversations are proof that consistent communication is working. Contacts who may have been dormant for years are being re-engaged. The firm is staying visible. And marketing is helping open conversations that would have been difficult to create through manual outreach alone.

Most importantly, Snappy Kraken has become a trusted business tool that supports the kind of long-term relationships Len wants to build.

“ We now have a reliable repository for client and prospect communications. I trust Snappy Kraken implicitly as a business function within my business. ”



Why It Matters: Long-Term Marketing for Long-Term Relationships

Len asks his clients to think long term. He wants them to build permanent, trusted relationships with his firm—relationships that can support them through retirement and beyond.

That same standard applies to the tools and partners he brings into the business.

“We have to have long-term, reliable partners because we’re asking our clients to be permanent in their relationship with us,” Len said.

For Len and Veronica, Snappy Kraken is not just a tool for sending emails. It is a system that helps the firm stay present, relevant, and consistent with the people they want to serve.

It gives the team a way to scale communication without losing the relationship-driven focus that defines their business.

Advice for Other Advisors: Start Before You Think You Need It



For advisors who want to grow and scale, Len’s advice is simple: build your marketing foundation early. **“Do it yesterday,”** he said.

Looking back, he sees how much harder it became to organize years of contacts after the fact. His recommendation is to capture every prospect, workshop attendee, and new relationship as soon as possible, then put those contacts into a system that keeps communication consistent.

“If you’re going to have a delivery mechanism, which you’re going to have to if you’re going to be successful and if you’re going to scale, get it started,” Len said. **“Don’t wait 15 years as I did.”**

The sooner advisors create that structure, the easier it becomes to stay visible, nurture relationships, and turn past conversations into future opportunities.

