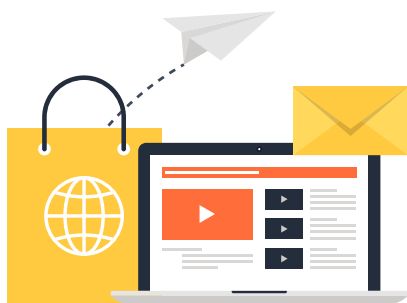


# Marketri Takes Financial Services Firm's Revenue Growth to New Heights



## INDUSTRY

Financial Services

## MARKETING SERVICES

Marketing Strategy  
Research & Positioning  
Persona Development  
Lead Generation  
Content Marketing  
Paid Media  
Marketing Automation

## BACKGROUND & GOALS

When a company sets aggressive growth goals, a strategic marketing program designed to generate quality leads is a must. So when a relatively young finance- and accounting-focused professional services firm set its sights on scaling fast, marketing was a top priority.

The firm's founder had grown and sold several successful companies and was eager to scale up his newest venture quickly. It was a prime opportunity to leverage modern marketing principles to drive and nurture quality leads. Unfortunately, the firm wasn't getting proactive, strategic marketing support—or measurable results—from its chosen agency.

The COO's Google search for "professional services marketing expert" led it straight to Marketri. The leadership team appreciated that Marketri President Deb Andrews has worked with 3 of the Big 4 accounting firms, as well as investment banks and private equity firms, while the agency overall has deep experience in financial services and professional services marketing. Marketri's strategy-first approach was another key selling point, ensuring the client would aim its resources in the right direction.

In mid-2017, the firm hired Marketri to develop a strategic marketing plan, then quickly expanded the contract to include execution and measurement of the plan over a multi-year period.

## BUILDING THE FOUNDATION

During the first six months Marketri established a foundation for success, setting the stage to generate higher quality leads on a lean budget and boost the marketing ROI. Marketri's initial strategy work included:



### TARGET AUDIENCE

Identifying the right target audience (CEOs and CFOs) and developing target personas for each.



### FOCUSED PLAN

Developing a sector-based and service-based approach to marketing, focused on high-potential segments like entertainment and private equity.



### CLEAR MESSAGE

Clarifying positioning and messaging to align with the target audience's needs.



### REFINED BRAND

Refining the brand to better resonate with a sophisticated, C-suite decision maker.



### MARKETING TECH

Establishing a marketing technology infrastructure—deploying HubSpot for marketing automation and leveraging its full capabilities, including lead scoring.



### SMART WORKFLOWS

Creating marketing workflows to guide leads through the revenue funnel and nurture them through every step of their buying journey.



### OPTIMIZED WEB

Revamping and optimizing the website, making it more relevant and search-friendly.

## EXECUTING ACROSS CHANNELS

With a solid foundation in place, marketing was positioned to scale right along with the business' growth. But this scalable framework was by no means cookie-cutter. Marketri's strategic marketing program leveraged the specific channels with the greatest potential to drive growth for this client, including inbound marketing, paid search, social media marketing, association sponsorships, and public relations.

A deep understanding of the target personas set the stage for developing relevant, search-optimized content. The client's 100+ in-house consultants provided an ideal bench of subject matter experts to draw on as initial content drafters—leveraging their expertise and keeping them engaged and productive during down periods. Marketri enhanced the staff-written blogs and guides to reflect modern marketing practices and SEO, and created gated content designed to convert website visitors into leads. This content machine made a huge impact, dramatically increasing organic search rankings for key terms and drawing in high-quality leads.

The client's multi-channel marketing program also included a narrowly focused, hyper-local paid search initiative targeting keywords they weren't ranking for and social media marketing that capitalized on the extensive network of the firm's 100+ employees. To establish the firm as a thought leader, Marketri pitched and secured media placements in top trade publications, including CFO and Mergers & Acquisitions.



## DELIVERING RESULTS

The client's decision to switch marketing agencies and hire an expert in professional services marketing paid off tremendously. In 2019:

- Marketing ROI exceeded 260 percent
- Marketing contributed to \$1.38 million in new revenue
- The firm closed 42 percent of leads, with an average contract value of over \$138,000



Beyond the surge in new business, the firm now organically ranks first on many critical keywords and has seen a dramatic rise in website traffic.

After achieving such strong results, the client increased its investment with Marketri by 3.5 times. It wasn't a leap of faith: Using marketing analytics, Marketri could accurately predict the additional top-line revenue the firm would generate from the increase in marketing spend. With marketing moving from a cost center to a profit center, the client eventually generated a higher ROI on its marketing than it did on the inside sales function.

Marketri's ability to track key metrics of success proved a winning factor for this client. As the CEO and founder noted, "Marketri excelled at measuring and reporting on metrics around all of our activities. Their work felt very data-driven and scientific. We appreciated that they always provided us with a clear sense of what's working and what's not. I was also amazed at their ability to go from concept to design to execution."



## KEY TAKEAWAYS

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### CHALLENGE

A young finance- and accounting-focused professional services firm set aggressive growth goals, making marketing a top priority. But its initial marketing agency wasn't providing the proactive, strategic approach the firm needed to drive a fast, profitable scale-up.

### SOLUTION

Marketri developed and executed a strategic, multi-channel marketing program designed to drive quality leads and nurture them through the revenue funnel. Year one focused on setting the foundation—from identifying target markets, personas and segments, to developing positioning and messaging, to deploying marketing technology. With the right infrastructure in place, Marketri executed targeted initiatives that included inbound marketing, paid search, social media marketing, sponsorships, and public relations.

### RESULTS

In 2019, the firm's marketing ROI exceeded 260 percent and marketing contributed to \$1.38 million in new revenue. The client now organically ranks first on many critical keywords and has seen a dramatic surge in website traffic since Marketri launched its strategic marketing program.



"Marketri excelled at measuring and reporting on metrics around all of our activities. Their work felt very data-driven and scientific. We appreciated that they always provided us with a clear sense of what's working and what's not. I was also amazed at their ability to go from concept to design to execution." - CEO & Founder