

PR:PEREXPRESSION

How a Growing RIA Platform Used Inbound Marketing to Drive **\$2+ Billion AUM in Pipeline**



1700%

Increase in lead gen
across inbound channels



382%

Increase in qualified leads
from LinkedIn Ads



248%

Decrease in cost per
lead from LinkedIn Ads



\$2,079,155,360

AUM in pipeline from
inbound marketing

About the Client

Our client was an award-winning RIA platform helping independent financial advisors grow their business. But their growth was achieved through strategic hires and quality service, as previous marketing agencies had failed to deliver results or even create a solid digital foundation.

THE CHALLENGE

Attracting and Converting High-Value Advisors with Marketing

The company had achieved rapid organic growth, building a multi-billion-dollar firm that supported over 100 independent advisors. They had worked with multiple marketing agencies to fuel that growth, but struggled to find a partner that truly understood their target audience of advisors with \$100+ million AUM – or knew how to reliably connect with them.

ProperExpression was hired to build a predictable growth engine, and our financial marketing experts to identify three core challenges:

Poor-Fit Leads

Ads were not targeted toward the right audience and didn't exclude irrelevant job titles. As a result, the company did not generate as many leads as they could, and most fell outside their target market – leading to unoptimized ad spend.

Undifferentiated Messaging

While the company had a clear vision and strong growth, their online presence lacked a comprehensive, consistent and differentiated message. Their website did not properly reflect their position as a leading and highly innovative RIA platform.

Lack of Marketing Visibility

Data was limited and reporting functions were lacking, making it hard to assess marketing and sales success. They lacked insight into the channels which drove results and couldn't quantify the impact marketing had in terms of pipeline and revenue.

About the Client

THE SOLUTION

Building a Growth Engine to Drive Predictable Revenue

ProperExpression undertook a large-scale overhaul of the company's marketing to put the right foundations in place – and ensure they generated measurable ROI:

➔ Full Funnel Reporting with HubSpot

ProperExpression worked alongside the client to create a robust data structure, supported by automations, unlocking full funnel reporting that answers questions like:

- Which channels and marketing activities produce the best leads?
- How do those leads progress through the funnel?
- Which channels influence revenue and how can they be optimized?

➔ Comprehensive Website Revamp

We helped the company rebuild their website to clearly position them as a leading RIA platform, increase organic traffic and improve conversion rates:

- Separate pages to clearly articulate each aspect of their offering
- Consistent messaging to build brand authority
- Enhanced navigation, user experience and design to drive conversions

➔ Expanded and Improved Content Production

Our team scaled up content production across all areas of the funnel to drive engagement and increase their online presence:

- Blogs aligned with a strong SEO strategy to boost organic traffic and build authority
- Conversion-optimized landing pages to support a range of campaigns
- High-value downloadable assets to attract leads, educate the audience and improve funnel conversions

➔ Optimized LinkedIn Ads Management

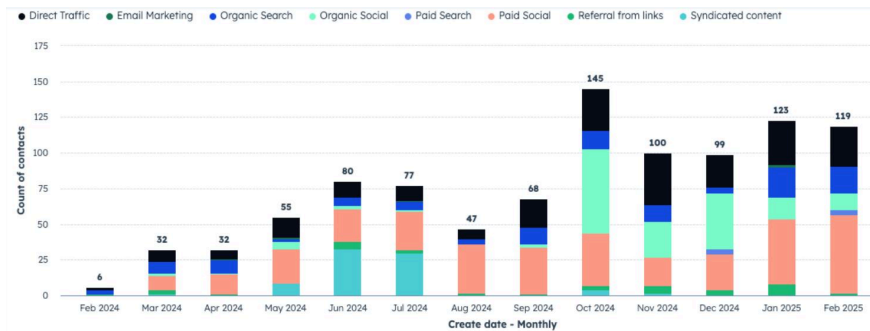
Our LinkedIn experts worked with the company's internal team to reengineer their LinkedIn Ads and refocus their strategy on winning leads and producing revenue:

- Refined ad copy and design assets to improve performance
- Reviewed targeting to exclude irrelevant job titles and increase relevance
- Managed budgets and optimized campaign timing to produce stronger ROI

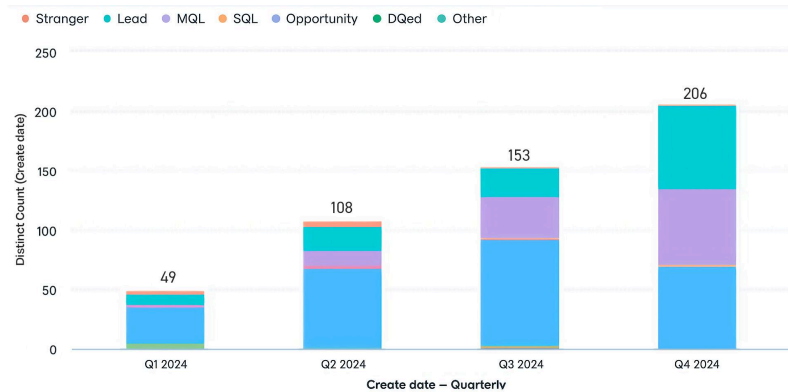
The Results

Our efforts helped the client produce immediate improvements in lead quality, bringing in leads that the sales team is excited to talk to:

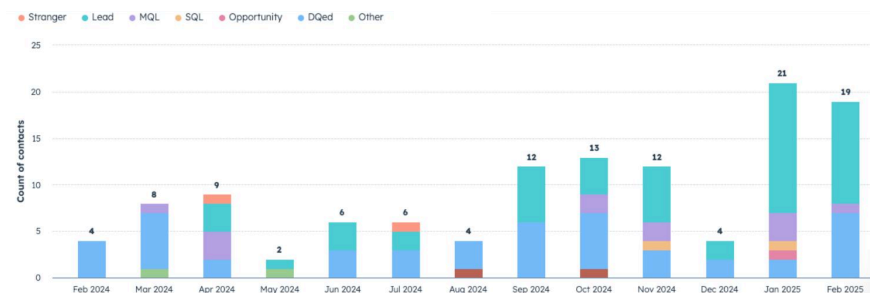
1700% increase in inbound leads across inbound channels



382% increase in qualified leads from LinkedIn Ads and **248%** decrease in cost per lead



41% increase in traffic YOY, generating **375%** more organic leads



17 deals created, contributing **\$2,079,155,360 AUM** in pipeline from inbound marketing

Want to Produce Similar Results?

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