

# Case Study: Social Advisors CUSTOM PERSONALIZED Content Creation

How Social Advisors Created an Average Increase of 850%  
more Engagement for Content on LinkedIn



## Amplifying Earned Media to Drive High Engagement with a Prospect Network on LinkedIn

Social Advisors leverages Marketing Automation and AI to run effective client acquisition campaigns for independent advisors and IARs. LinkedIn, Custom Content, and CRM work in unison to find ideal prospects, connect with them on a human level, tell the advisor story, nurture the growing network, and track which prospect is ready for direct follow-up.

### The Problem

In Financial Services, a heavily regulated industry, marketing communication for independent advisors and IARs is heavily scrutinized. For this reason, financial firms and third-party vendors offer pre-approved libraries of content for advisors to utilize in their marketing.

Results of the industry “canned” content:

1. Advisors have a difficult time differentiating themselves across social platforms.
2. Personal Storytelling Sells. “Canned” content is not personal and it does not tell a story.
3. “Canned” content is created to protect the firm. It is not created to help the advisor gain exposure on LinkedIn and other social platforms.
4. Automating “canned” content delivery limits advisor participation in the process, leading to little engagement and limited client acquisition.

## Social Advisors Solution

For each of their clients, Social Advisors creates 8-12 social posts focused specifically on the advisor client. The content is created for the prospect persona, focused on storytelling and problem solving. Leveraging Post Party technology, Social Advisors puts the custom personalized content in front of a HUGE target audience.

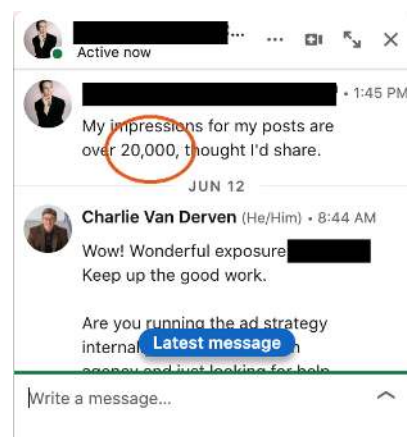
Benefits of CUSTOM PERSONALIZED content:

1. A sense of ownership and pride over the content shared by the advisor.
2. A dramatic increase in exposure of the advisor's brand and story to the network they are crafting on LinkedIn.
3. A dramatic increase in engagement within the network the advisors is building.
4. Quicker conversion and ROI for the content shared by the advisor.

## Campaign

Move three independent advisors from "canned" third party content to CUSTOM PERSONALIZED content created by Social Advisors.

Social Advisors studied three advisor clients. Examining the results of the 10 posts prior to working with Social Advisors and comparing that to their 10 most recent posts created by Social Advisors, we found the following increase in engagement.



## Advisor #1 - Charleston, SC

10 Posts Prior to Working with  
Social Advisors

134 Engagements

10 Posts Since Working with  
Social Advisors

537 Engagements

Increased Engagement with  
Social Advisors

**400%**

## Advisor #2 - Edmonton, Alberta, Canada

10 Posts Prior to Working with  
Social Advisors

60 Engagements

10 Posts Since Working with  
Social Advisors

492 Engagements

Increased Engagement with  
Social Advisors

**820%**

## Advisor #3 - Wilmington, DE

10 Posts Prior to Working with  
Social Advisors

25 Engagements

10 Posts Since Working with  
Social Advisors

333 Engagements

Increased Engagement with  
Social Advisors

**1332%**



# Social Advisors your CUSTOM CONTENT and MARKETING AUTOMATION partner

Social Advisors team members have driven evolution of marketing and business development in financial services since 1998. We helped usher in websites, email marketing, and the social revolution.

As the technology tools continue to evolve, we're your partner, providing you an efficient technical advantage and helping you maximize opportunities with Marketing Automation and Artificial Intelligence.

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