

Financial Services

Some of the clients we've helped to scale enterprise value with marketing



See the marketing strategy we created for a financial services company



DOWNLOAD

Website Strategy - Key Pages - How It Works

Empower everyone to make data-driven decisions

Grow Your AUM and Receive More Referrals

2023 Expense Summary (Marketing)

Overall, 2023 program spend of \$917,083 at 60% of total budget already in a healthy range for demand generation (~50%).

Category	2022		2023	
	Amount \$	Amount %	Amount \$	Amount %
People	\$182,911	24.48%	\$466,722	29.48%
Support	\$320,500	42.89%	\$151,900	10.00%
Programs	\$243,796	32.63%	\$897,883	60.52%
Total	\$747,208	100.00%	\$1,515,305	100.00%

ALESSA

Solutions

Identified opportunities to test new lead sources and optimize existing ones

Challenges

Missed sales targets due to a lack of quality pipeline

Developed a focused go to market to target 'best fit' prospects with highest ACV potential

Unfocused go to market strategy, with many customers outside of the true ICP

Analyzed marketing and sales metrics to determine ROI, acceptable cost per opportunity and budget needed to meet sales quotas

Opportunistic approach leading to highly customized features to meet individual needs

Two-pronged approach of inbound and ABM motions for different market segments

CFM

Solutions

Segmented customer base and produced ABM roadmap to convert key accounts

Challenges

No focused GTM - large potential for cross-sell and upsell, but no strategic plan to hit sales target

Created GTM framework prioritized based on whitespace in customer base

Low MQL to SQL conversion rate due to difficulty tracking which sources drove leads

Provided recommendations for marketing data structure and audited existing marketing activities to focus on top revenue-driving activities

Lack of maturity in paid media and content and no ABM activities, due to small marketing team

Created inbound paid media and content marketing roadmaps and ROI model to focus on driving revenue



Lacey Ford
SVP Marketing at insightsoftware

"The How To SaaS team was critical in helping us build the framework to scale our demand generation efforts and deliver on our board's expectations. We are ready to scale for future growth and I would highly recommend working with them."



Learn how we can help your business scale with marketing optimization

BOOK A CALL