

The **Snappy Kraken** Marketing Method:

TOP PERFORMING CAMPAIGNS FOR

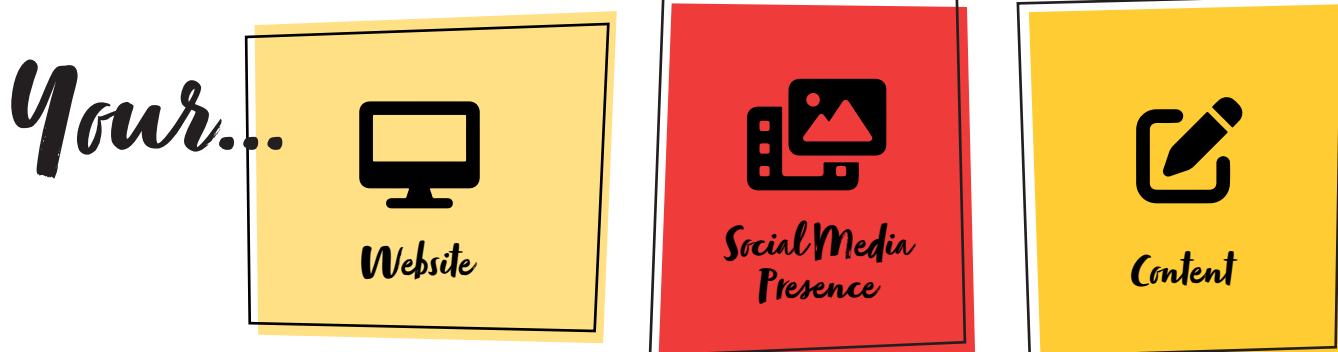
Financial Advisors



What makes a client choose one financial advisor over another? Their track record?
Years of experience? The number of high-profile clients they've helped?

All of these things come into play...however, until a prospect has had a conversation with you, it's unlikely they will know those details.

What they will know is what's immediately **visible**:



Consider this: based on a 2019 study by Oberlo, 81% of consumers conduct online research before making an in-store purchase of \$500 or more. **On average, they spend 79 days gathering information before making the purchase.**¹

If that much research and time goes into purchasing a refrigerator or new stereo, how much research will your potential clients do before handing their financial future to an advisor?

This is why your content is so important. **Great content makes an unforgettable first impression. It helps you build trust and relationships with your clients and prospects.**

**POOR CONTENT MAKES YOU INVISIBLE,
AND LIKELY TO BE IGNORED BY EVERYONE EXCEPT DIRECT REFERRALS.**

Here at Snappy Kraken, we are on a mission to help advisors
STAND OUT with high-quality, original content.

In this short guide, we'll show you **8 of our best marketing campaigns** along with the stats on how well they performed. We'll also talk about our philosophy and process behind creating content for advisors.

¹ <https://transaction.agency/ecommerce-statistics/81-of-shoppers-research-their-product-online-before-purchasing>



**IF YOU'RE THINKING ABOUT USING
SNAPPY KRAKEN FOR YOUR MARKETING,
HERE'S A PEEK AT OUR CONTENT – AND
HOW THE SAUSAGE GETS MADE.**

And if you're just interested in getting better marketing results? This guide is full of ideas that you can swipe for your own marketing campaigns.

Let's dive in.

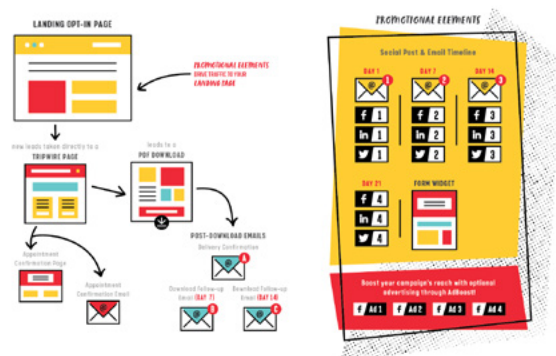
FUNDAMENTAL CAMPAIGNS

For Prospects & Clients

1 LEAD GENERATION CAMPAIGN

The multi-channel Lead Generation Campaign funnel captures leads with a free guide designed to create curiosity and engagement. The guide provides good advice while opening a loop with critical questions that the prospect must work with you to resolve.

Prospecting emails, social media posts, and optional Facebook ads drive traffic to your offer. Follow-up emails push for an appointment and can be connected to your calendar tool of choice.



HIDDEN TAX OPPORTUNITIES THAT ARE LIKELY TO EXPIRE

Connect with prospects who want to take advantage of the current tax laws before they expire. This Lead Generation Campaign highlights the urgency of leveraging current tax opportunities before they disappear.



Insight

Taxes are **ALWAYS** a high-performing topic with HNW investors looking for ways to lower their tax bill. This campaign taps into FOMO (fear of missing out) and builds urgency by highlighting that these opportunities may be going away soon.

Stats



306,380

e-mails sent



25.5%

open rate

Open Rate: The percentage of email recipients who open a given email.

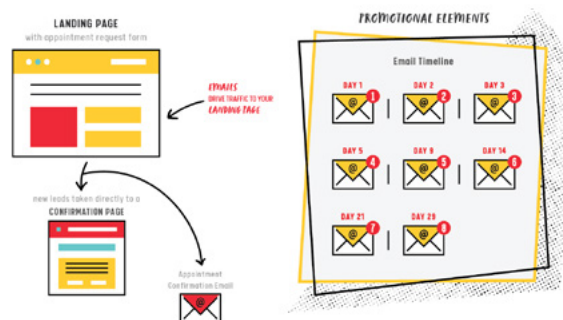
Financial Services Average Open Rate (May 2022): 21.25%

Source: Constant Contact, June 2022

2 PROSPECT ENGAGEMENT

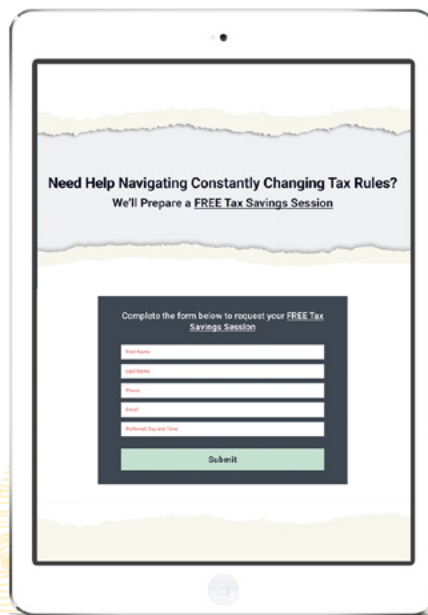
This email-based engagement campaign highlights the value of your expertise and invites prospects to book an appointment. Engagement emails build urgency to get advice and drive traffic to a landing page featuring a free 1-on-1 session - in this case, a Tax Savings Session.

Follow-up emails can be connected to a booking URL.



TAX PLANNING

Help your prospects feel confident in finding hidden tax opportunities.



Insight

This campaign follows up on the powerful **Hidden Tax Opportunities Lead Generation** campaign and pushes the value of an appointment in capturing these time-sensitive opportunities.

Stats



303,040

e-mails sent



24%

open rate

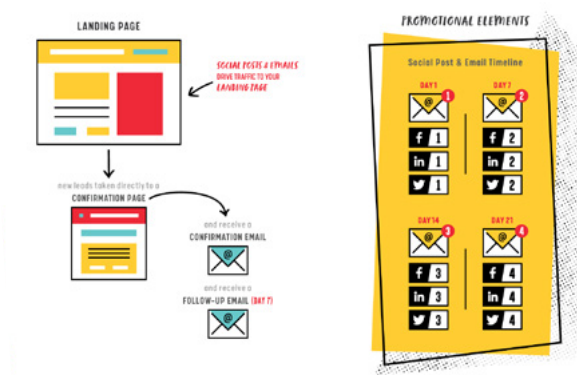
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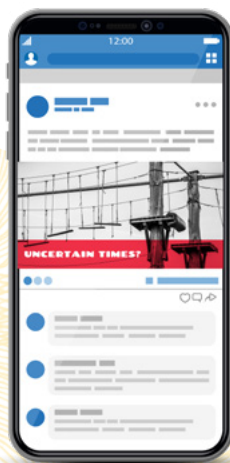
3 VISUAL INSIGHTS NEWSLETTER

Our Visual Insights Newsletter series offers interesting and entertaining insights on current topics to wow clients and nurture prospects. Each lushly designed issue delivers four weeks of emails and social posts to keep your audience engaged - you top of mind.



SILVER LININGS OF UNCERTAINTY

Inspire your clients and prospects to live a more fulfilling life by learning how to deal with uncertainty better.



Insight

Uncertainty is high these days but how you approach it can make **ALL** the difference to your clients and prospects.

Stats



306,432

e-mails sent



31.5%

open rate



19,347

clicks

Open Rate: The percentage of email recipients who open a given email.

Financial Services Average Open Rate (May 2022): 21.25%

Source: Constant Contact, June 2022

4 TIMELY EMAIL

Emails that address current events are likely to encourage responses because they connect, on an emotional level, with what your audience may be experiencing. We release Timely Emails twice a month - and more as needed.

BEAR MARKET, NOW WHAT?

This simple, timely email delivers reassurance and perspective on the bear market when fear and anxiety is high.

Here's the type of responses our members get when they send our timely emails:

"I always love your emails. It's a scary time right now, but you have reassured me (and I hope all your other investors) that it will be ok. Keep up the good work!"

"We are so grateful to be going through this with YOU as our advisor. I can't imagine a repeat of 2008 without you! [We've] reached out to others and will continue to sing your praise... Thank you for all you're doing to help in this unprecedented time."

"Thank you very much. This note and the historical data is exactly what I needed. In fact, I was just having a conversation about this kind of market behavior when your email hit my inbox. Perfect timing, and good info."



Insight

Timely emails are designed to reflect on and connect with shared experiences in real time.

Stats



190,758

e-mails sent



34%

open rate

Open Rate: The percentage of email recipients who open a given email.

Financial Services Average Open Rate (May 2022): 21.25%

Source: Constant Contact, June 2022

Featured Case Study

How Life Strategy Financial Used **ORIGINAL CONTENT TO** **WIN THIS \$6M CLIENT**



Juan Munoz,
CFP, AIF

Financial Advisor,
Life Strategy Financial



CHALLENGE

Finding high quality done-for-you content is hard. Many content libraries are full of outdated campaigns or or bland content that lacks warmth and empathy. This makes it nearly impossible to build human connections and get results.

"I was using another content service, but the content was so boring. It had no emotion to it, and I wasn't getting any response from my prospects."



SOLUTION

Juan heard about Snappy Kraken at a conference and the quality of the content stood out to him. A few months later, he decided to sign up and give it a try.

"Snappy Kraken's content feels so much more human because it sparks emotion. I've gotten much better results since I switched to Snappy."



RESULTS

Juan won a \$6M client within his first year of using Snappy Kraken (along with a few other clients as well).

"I was competing with two other advisors for this account and they picked me. That was a big deal for my business. I asked the client why they chose me. They said it was because my content was really good, and that stood out to them."

Stories like this highlight why your content is so important. When a prospect is researching and comparing advisors, content is one of the things they look at to make their decision.

THAT'S WHY WE LIKE TO SAY,
"great content wins clients!"