



Alicia L.

Client Transformation

How **Alicia** Transformed Prospects Into **Large Clients** With **Automation Engine's Consistent Communication**

In the world of financial advising, there's a common frustration: **potential clients who show promising interest by attending events and scheduling appointments, only to disconnect soon after.**

This was a familiar challenge for Alicia's team, as it navigated the unpredictability of client engagement.

Recognizing the need for a strategic approach, the office focused on the power of staying in front of prospects through consistent nurturing by leveraging Automation Engine.

This perseverance seemed to pay off when one of its campaigns struck a chord with a previously disengaged prospect.

Prompted by a campaign, the prospect filled out an appointment request form, reigniting the relationship.

Alicia's team promptly followed up and set an appointment that transformed the prospect into one of its **largest clients.**

Reflecting on this win, Keri from the office shared,

"This is why I love the nurturing aspect of Snappy Kraken."

The experience underscored the transformative impact of thoughtful and consistent communication in turning potential into reality.

Most Successful Prospect Engagement:

Finding Your Balance:
Could Rising Interest Rates Put Your Retirement Income at Risk?

Audience **3,146**

Open Rate **33%**

Appt. Requests **3**

Most Successful Paid:

Media | High Value Offer

441 Audience

45% Open Rate

12 Appt. Requests