Josh B.

Long-Term Success

How **Josh and His Team** Engaged Prospects to **Help Secure a $7 Million Client** With **Automation Engine's Long-Term Engagement Tools**

Josh's firm experienced remarkable success with the help of Automation Engine, which played **a pivotal role in the acquisition of a $7 million client who had been consistently engaged with the office's content over several years.**

Since 2021, the client received 34 campaigns composed of newsletters and lead generation efforts, during which he interacted significantly by opening 65 emails and clicking 19 links.

This engagement culminated in the client attending a webinar, **ultimately leading to a booking and a new client for the office.**

The automation and consistency provided by Automation Engine helped ensure that prospects like this remained informed and connected, which helped reinforce trust and interest. Josh attributes part of this win to the platform's ability to deliver timely and relevant content that resonates with its audience, creating ongoing value.

This feedback underscores the effectiveness of the automated content, highlighting its role in **engaging the audience and saving valuable time and resources** for advisors.

This story helps exemplify the transformative impact of automated marketing solutions on client engagement and business growth.

Most Successful Prospect Engagement:

Investment Opportunities in Volatile Markets

Audience	3,519
Open Rate	25%
Appt. Request	1
Conversion Rate	0.04%

Most Successful Lead Generation:

Riskalyze Lead Generation Campaign

76	Audience
39%	Open Rate
8	Appt. Requests
10.5%	Conversion Rate

Most Successful Paid:

Media | High Value Offer

Audience	264
Open Rate	21%
Appt. Requests	2
Conversion Rate	0.75%