



Scott T.

Engage and Stand Out Consistent Connections

How **Scott** Maintained Client Engagement With **Automation Engine's Consistent Communication Tools**

Scott's firm encountered a common challenge in today's competitive landscape: maintaining client engagement amidst a plethora of advisors.

Recognizing the importance of nurturing relationships beyond initial contact, it sought an effective solution to keep its communications consistent and impactful.

Enter Automation Engine. By implementing Automation Engine, the office helped ensure its client list remained active and engaged, effectively maintaining connection with clients who lived nearby while standing out in a crowded advisory space.

"It does seem to keep the list warm," Scott said, adding that the firm has a lot of people who live really close to the office, but there are also a lot of advisors. "And what we don't want to do is have events and never talk to people again. So it's been helpful in keeping in touch with our list."

By maintaining this steady communication, it helped ensure the office's services remain at the forefront, providing clients with a reliable and proactive advisory experience.

Most Successful Prospect Engagement:

Investment Recovery

Audience **6,667**

Open Rate **20%**

Appt. Requests **4**

Conversion Rate **5%**

Most Successful Lead Generation:

Inflation and Your Retirement

141 Audience

15% Open Rate

1 Appt. Request

19% Conversion Rate

Most Successful Paid:

Media | High Value Offer

Audience **972**

Open Rate **34%**

Appt. Requests **19**

Conversion Rate **7%**