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Nolan Baker

Financial Advisor, Founder of America’s Retirement Headquarters

How **Snappy Kraken** saved

AMERICA’S RETIREMENT HEADQUARTERS

40+ hours a month

Creating Marketing Campaigns



25%

Increase In Conversion Rate



76%

Company Growth in One Year



Time Saved

Priceless



America's Retirement Headquarters is a financial advisory service serving Michigan and Ohio – on a whole new level.

ARH offers advice on estate planning, retirement, health and benefits, and taxes.

HIGHLIGHTS

Challenges

Too many areas of the business to focus on and not enough time

Needing to communicate with existing clients and new prospects

Lack of a strong digital marketing strategy with a repeatable process

Challenges

Finding an Effective, Time-Saving Solution to Communicate with Current Clients and New Prospects

As a business owner in the busy finance and investment sector, Nolan Baker, financial advisor and founder of America's Retirement Headquarters, had to focus his attention everywhere at once. Payroll, and spreadsheets, and marketing. Oh, my!

Nolan knew he needed to reach new prospects while continuing to communicate with current clients effectively. He needed to not only maintain but also grow his business.

Although Nolan thought he was doing a good job with this task, he felt there was more he could be doing. He needed consistency and more options to reach new prospects and keep his current clients engaged.

"I needed to continue to maintain my current client base and develop some other marketing strategies for client acquisition from people that weren't yet clients of the firm," Nolan says.

Because prospects don't bite the first time and already hooked clients slip the line if relevant content isn't interesting to them, Nolan needed strong digital marketing to cater to both problems.

But with his hand in so many aspects of the business, he just didn't have the time to spend hours creating marketing campaigns that engaged and made a difference.

"As a business owner, there are always other things that I need to be doing, that need my time, and creating campaigns is definitely not one of them. It's all a matter of trying to bring it all together," he stresses.

After researching the components of marketing campaigns and the writing time involved, Nolan discovered he'd have to spend 40+ hours a month of his valuable time creating campaigns just to be successful at it.

Daunted by that idea and the alternative—hiring a costly company to do it for him—Nolan opened his web browser and found Snappy Kraken.

It had the relevance and uniqueness he was looking for.

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Solution

Relevant and Easy to Use Industry-Specific Plug & Play Content

Nolan uses Snappy Kraken as part of an all-encompassing marketing program. What attracted him to signing up was that it was unique and industry-specific. He liked Snappy Kraken's look and feel, and especially liked the timely pieces it created on relevant topics.

Already using a Customer Relationship Management (CRM) program, Nolan was able to export data simply from that into Snappy Kraken.

Segmenting clients into lists for separate campaigns proved to be a snap! This meant that Nolan could split messages between clients and prospects, but also take it one step further and segment it into profiles and levels of engagement.

"We also even tag our clients based upon levels of interest. So, people that are golfers or people who like to go to wine events or people who like a vacation. For people who are non-CRM or people who don't segment their list, it is very easy to do with Snappy Kraken," Nolan says enthusiastically.

From Nolan's point of view, Snappy Kraken's program complements the system already in place.

America's Retirement Headquarters has a content plan with a different theme as the focus for each month. Within this plan, specific events, actions, mailers, promotions, and webinars are sent out. With Snappy Kraken, Nolan can use pre-built campaigns on the same topics.

The program that Snappy Kraken offered—it's tailored for financial advisors. So, you've already got great communication that's industry specific, and a huge library of pre-built campaigns that are already done to make it more of a plug-and-run type system," Nolan explains.

Snappy Kraken does all the hard work in creating multi-step campaigns. From writing the content with images to putting together the sequence of events, it takes care of everything. Snappy Kraken even makes sure content is compliance-ready by getting the Financial Industry Regulatory Authority (FINRA) reviewed letter into place.

"If you created one campaign, I bet it would take you 40 hours to create a campaign. With Snappy Kraken, I refer to it as 80% done for you," he says.

From these ready-to-go campaigns, Nolan can personalize and match them to his brand. He can then bundle these same campaigns on multiple platforms—podcasts, blogs, emails, and even his radio show spots.

HIGHLIGHTS

Solution

Segmenting campaign lists

Time-saving content that is:

- Ready to use
- Industry-specific
- Relevant
- Versatile
- Customizable

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Results

Approximately 40 hours of Time Saved a Month and Conversion Rates Up By 25%

Nolan likes that the versatility of one content piece saves time and attracts leads on different platforms.

He can take one article created by Snappy Kraken and use it as an advert on Facebook or LinkedIn. Then, Nolan can use this same material in an upcoming event. Snappy Kraken even sends an invitation for current clients and new prospects to attend. This content repetition works well.

“I think in today’s society, people just need to see things multiple times. It’s just another layer to continue to be top of mind in a variety of different channels. I think it just increases the conversion ratios, probably by 25%,” Nolan reflects.

According to Nolan, the partnership has been great, and Snappy Kraken has been helpful. Even during the COVID-19 pandemic, the company did not shy away from communicating with clients.

“Snappy Kraken was consistently rolling out articles we could email out to our clients. A lot of financial advisers struggled with COVID when it came out—our business experienced a 76% growth last year,” Nolan states.

HIGHLIGHTS

Results

Approximately 40 hours of time saved not having to create campaigns


25% increase in conversion rate

76% company growth in a year

235 form submissions

4,604 landing page clicks

9,053 opened and reviewed emails



From Nolan's point of view, Snappy Kraken's program complements the system already in place.

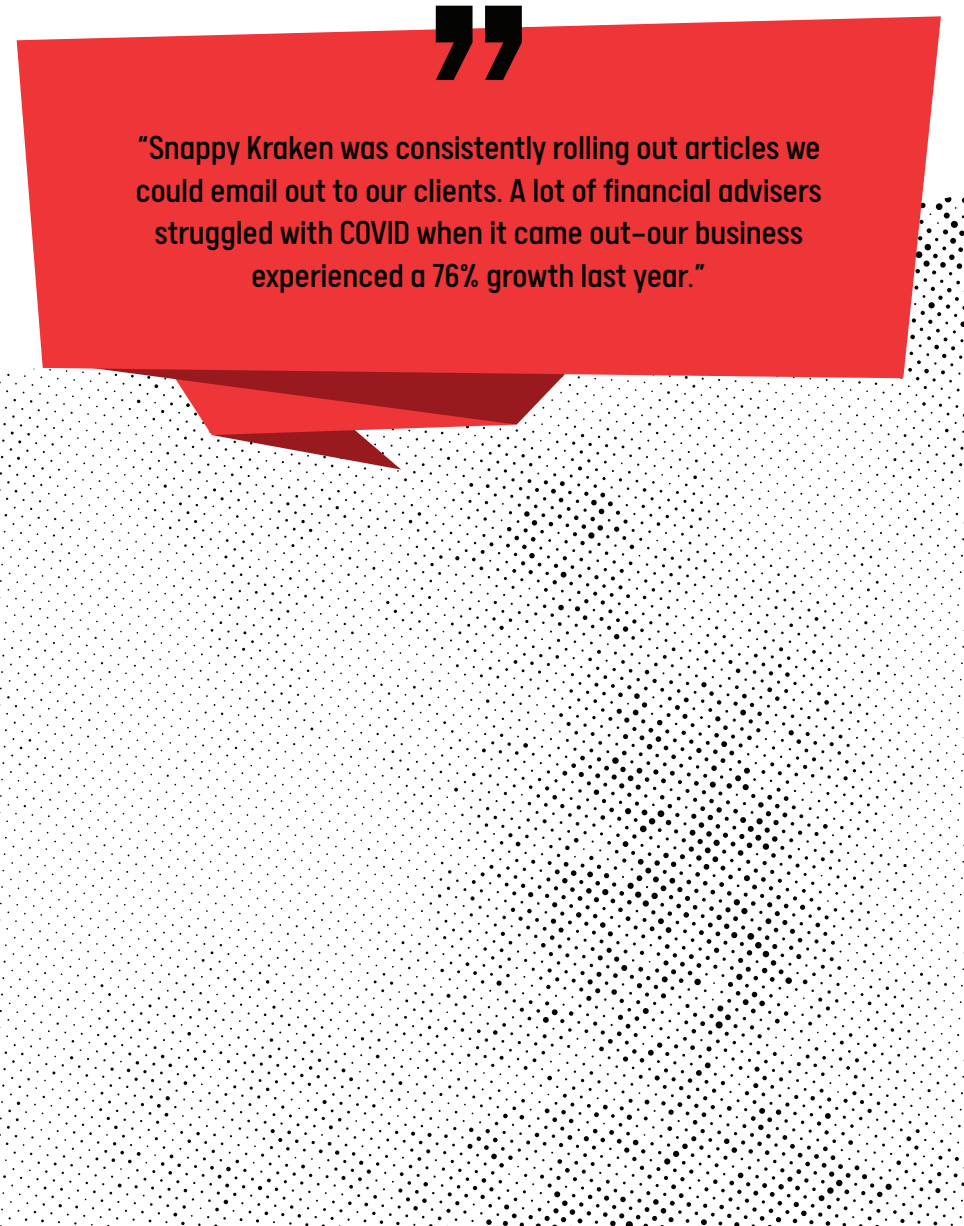
According to Nolan, just one of Snappy Kraken's campaigns has contributed to 235 form submissions, 4,604 landing page clicks, and 9,053 opened and reviewed emails. All results are trackable and accessible within 24 hours. With this quick turnaround time, Nolan's been able to make better-informed decisions and forecasts for every aspect of his business.

Using Snappy Kraken has helped Nolan save time and led to more clients and higher client retention rates.

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