

New Subscriber Audience Adds Up For Investment Advisory

Path2Response creates tailor-made audience targeting response-ready investors, leading to solid growth in newsletter subscribers and new client conversion.



Challenge

For decades, this brand has guided families and individuals along the path to creating their financial futures. To showcase their expertise and stay top-of-mind with current and potential investors, the brand distributes a newsletter which has proven to be a key element of their marketing mix.

This client presented a two-fold challenge to the Path2Response team: 1.) fuel growth in their newsletter subscriber base, 2.) boost the value of their newsletter and attract more sponsorship ad revenue from individual investment advisors.

Given past successes in the financial sector, our team quickly got to work building a customized solution tailored to the client's objectives.

“From a performance perspective, the Path2Response lists were very strong, consistently among the top performers; we are all very pleased!”

- Director, Direct Mail and Database Reporting Firm



Solution

The Path2Response team met with the client to discuss key goals, as well as tactics that were working (or underperforming) within their marketing audience mix.

Based on the client's objectives, we recommended our Path2Acquisition solution, which identifies a response-ready audience custom-tailored to each client's unique KPIs and campaign targets.

We pre-configured the model using parameters that would maximize performance aligned with the client's goals. The model evaluated billions of data points and ran through 1000s of iterations to yield the client's optimal audience.

Results



106

Investment
Index



124

Subscriber
Index

Big dividends! The client's custom-built audience delivered solid boosts for their key performance metrics: subscriber index and investment index.

With proven results established, the client is moving forward with rollout and additional depth testing. They're bullish about this unique new source for growth in subscribers and advisor engagement, and are planning for robust ROI in upcoming campaigns.

