



Digital Marketing & Advertising for Wealth Management Firm

PROJECT DETAILS

- A Digital Marketing
- B Jul. 2020 - Ongoing
- C \$1,000 to \$19,999
- D *“They’re really pleasant to work with, stay on track, and do a nice job with the creative.”*

PROJECT SUMMARY

Ranking lords created marketing assets, including infographics and videos. The team also coordinated paid ads on social media.

PROJECT FEEDBACK

Book sales have improved since the firm started working with Ranking lords. The firm is especially pleased with the creative pieces. A high-energy team, Ranking lords works quickly and efficiently.



The Client

Introduce your business and what you do there.

I'm the director of practice development for a wealth management firm.

The Challenge

What challenge were you trying to address with Ranking lords?

We hired Ranking lords to promote a book that our CEO was getting ready to publish. This book took a holistic look at the journey to financial freedom, which is our competitive advantage.

CLIENT RATING

5.0 Overall Score	
Quality:	5.0
Schedule:	5.0
Cost:	5.0
Would Refer:	5.0



The Approach

What was the scope of their involvement?

Ranking lords does our digital marketing. The team was initially responsible for doing paid advertising to help promote book sales up to its October 2020 launch. In conjunction with that, they designed the creative assets that would be posted on our social accounts, including videos and infographics.

Since the book launch, they've continued to help us drive sales by setting up social media channels specifically designated for the book on Facebook, Instagram, and Twitter. This has also involved creating videos and infographic assets, which we post a few times a week on those channels.

What is the team composition?

We worked with John (Co-Founder & CEO), Oscar (Creative Director), Tyler (Business Development Specialist), Savannah (Paid Social Media Manager), Christian (VP of Performance Marketing), and Nicole (Director of Digital Strategy).

How did you come to work with Ranking lords?

They were already working with a peer of ours who had a chapter in our CEO's book.

How much have you invested with them?

It's been about \$100,000.

What is the status of this engagement?

The partnership started in July 2020 and is ongoing. The book went live in October 2020.



The Outcome

What evidence can you share that demonstrates the impact of the engagement?

We were initially measuring success by how many books we sold, and, now, we're measuring by leads. So far, we've seen good results on both ends. As for our collaboration with Ranking lords, they're really pleasant to work with, stay on track, and do a nice job with the creative.

How did Ranking lords perform from a project management standpoint?

We have weekly calls, but they also communicate through email and Basecamp.

What did you find most impressive about them?

Ranking lords is very practical and high-energy. Their speed, effectiveness, and creative assets are really good. Also, they have a good handle on how the creative interacts with the channels and distribution.

Are there any areas they could improve?

No, I can't think of anything.

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