



## Lead Generation for a Financial Investment Company

How does a Financial Investment & Trading Advisory scale its business to get 50+ sales per month via Digital Marketing?

### The Client

The Client is a leading provider of financial investment products, trading tools, and software in Australia. Despite offering some of the best investment solutions in the market, the Client struggled to make enough sales every month to justify its ad spend and made almost no sales through digital channels.

### The Goal

Startup-n-Marketing (SnM) was tasked with developing a digital marketing strategy that'd deliver a steady stream of top-quality leads for the Client. This would go a long way towards achieving the Client's goal of increasing monthly sales via digital channels without spending too much on customer acquisition. As always, SnM delivered.

### The Strategy

We started by analyzing the Client's existing lead generation framework to understand the key barriers to scaling. This involved:

1. Measuring the effectiveness of old campaigns to determine what worked well and what didn't.
2. Identifying the audience segments that delivered the highest-quality leads and best results.
3. Flushing the existing sales funnel to find weak points.



Afterward, the SnM team began to put a framework in place to increase lead generation and sales. We:

1. Revamped the outlook of the Client's marketing campaigns by changing designs, creating new ad copies and landing page elements, and adopting content marketing best practices.
2. Continually optimized campaigns using our "best-of-test" strategy.
3. Used tools like Twilio to initiate instant calls with hot leads

The next step was to diversify the Client's customer acquisition efforts. When Startup-n-Marketing took over its digital marketing management, the Client relied on static and video ads for lead generation. We leveraged the following to reach more prospective customers and increase user engagement with the Client's brand:

1. A high-value recorded webinar training – ran as an evergreen webinar
2. A high-demand lead magnet
3. YouTube search ads
4. A live webinar session – broadcast twice per month.

Each of these channels brought in good leads at a low cost. To increase their quality, the leads were nurtured through emails, an SMS sequence, and Calendly appointment booking.



## Results

Within 2 months of taking over the Client's digital marketing and lead generation, we increased monthly sales from digital channels by 150%, from less than 20 to over 50 sales every month. The cost per sale (CPS) was also reduced by 20%.

As a result of our work, the Client generated total revenue exceeding \$2 million within 6 months of bringing Startup-n-Marketing on board.

Ad Set Name	Results	Reach	Frequency	Cost per Result	Budget	Amount Spent
Investment - Inv - 860K	17 Leads	7,612	1.78	£26.88 Per Lead	£0.78 Daily	£456.89
Investor - Inv - 550K	39 Leads	13,768	1.97	£22.04 Per Lead	£45.00 Daily	£859.51
Personal_Finance - Fin - Expanded	82 Leads	28,016	1.97	£18.76 Per Lead	£0.78 Daily	£1,538.28
Financial Services+Money Management - F...	14 Leads	12,344	1.73	£33.09 Per Lead	£0.78 Daily	£463.22
Top Australian Banks - Fin - 320K	— Lead	1,781	1.40	— Per Lead	£0.78 Daily	£101.34
Results from 58 ad sets	806 Leads	222,912 People	4.03 Per Person	£24.29 Per Lead	£0.78 Daily	£19,575.21 Total Spent

Would you like to replicate these results for your business?

Click [here](#) to schedule a call