



Financial Investments Lead Generation Case Study

GOAL

A leading financial advisory company needed to expand its customer awareness and client investment in its Robo-Advisor services.

CHALLENGES

As this financial service was relatively new for the industry it required a three-pronged approach - brand awareness, education of the solution and an initial client investment.

SOLUTION

DGLV's consulting team determined the first two stages - brand awareness and education - were paramount to getting client investment. DGLV combined a Display/Video tactic on financial-related sites for the awareness and education piece and used Display Retargeting and Search tactics to offer the solution and capture the lead (client investment).

RESULTS

Over a 3 month period, DGLV increased the Search CTR over 4X, saw the client's web site traffic increase over 3X, and doubled the client investment.

