

Case Study: Asset Manager Saves \$200K, while receiving 4+ High-Performing Campaigns

The Challenge Cutting through a crowded asset management marketplace required more than content alone. The firm needed an end-to-end solution - from campaign strategy and content creation to deployment and reporting, that delivered consistent execution and measurable advisor engagement.

The Current State

Goal:

Strengthen advisor engagement and deliver measurable outcomes through multi-channel campaigns that highlight investment expertise.

Employees: 51 - 200

Financial Measure: \$15.3 Billion +

Presence: United States

Sector: Investment Management

Our Solution: FLX Engage360 delivered a full-service marketing engine that combined strategy, design, and execution into measurable outcomes.



End-to-end campaign delivery from strategy, content to reporting.



Proprietary data and segmentation enabled precise targeting.



Integrated Multi-channel distribution to 100,000+ advisor audience.

The FLX Advantage

Cost Savings



- 4 campaigns in <6 months, saving up to \$200K in-house marketing resources.
- 50%+ reduction in manual analytics time via centralized reporting dashboard.
- Saved \$90K-\$110K annually by not purchasing CRM software and advisor data licenses.

Growth Potential



- 45+ content downloads with up to 37.5% CTR across email campaigns.
- Achieved open rates of up to 19.51% with 8,000+ unique opens, reflecting strong advisor engagement and quality reach.

Productivity



- 500+ staff hours saved by outsourcing campaigns to FLX Engage360.
- 50% faster speed-to-market, four campaigns in <6 months vs. 12+ in-house.
- Enabled investment teams to focus on portfolios and client relationships.

