



TIFIN Clout Case Study: End-to-End Results

From digital marketing to content marketing to social selling; advisors these days are bombarded with buzzwords, best-practice tips, and lists of tactics you should try for your firm. However, rarely do these articles walk through a specific journey of how an advisor can turn these theoretical concepts into practical actions that generate ROI.

In this case study, we will introduce you to a Clout client's process from onboarding to campaign development to outcomes to better illustrate how these marketing programs can get started and produce results.



Met Kai Chen from Ocean IQ Capital.

Here are the highlights of Kai's story with Clout:

- OceanIQ Capital started using Clout's turnkey marketing services in May 2021.
- Kai came to us with an initial idea of where he had previously sourced some of his best clients but needed help expanding his reach and frequency to target potential prospects.
- Being a Bay Area advisor, he had an interest in reaching employees of tech firms in their pre-IPO stage, or just after a recent IPO where they would need the help of a trusted advisor to assist with a set of new financial challenges.
- Working with his Clout dedicated financial marketing specialist, we assisted Kai to target thirty Pre-IPO/IPO companies in the local geographies he cared about most. We helped Kai generate an appropriate prospect list and generated curated email campaigns with relevant content discussing

markets, financial products, and various investment strategies and opportunities that OceanIQ has to offer.

- In a short period of time, Kai went from an irregular social voice to a consistent content presence to his key audiences. Clout worked with him to push out at least one social post and email per week. This consistency increased his reach and frequency to become top of mind for both clients and prospects.
- By working with Kai to optimize his campaign through Clout's intelligently sourced content, he was able to gain a response from the Founder and CEO of a growing Bay Area startup. The individual read a relevant article that we included in one of Kai's emails featuring a prominent bay area tech figure.
- Kai used the right content with the right subject capturing the attention of a specific type of client. The hyper-personalized approach generated a response where the individual wanted to discuss their new financial situation with Kai. After some initial conversations, Kai was able to welcome them into his firm as a client in September of 2021.





This is a great example of how personalized marketing can drive impact and results for advisors. By taking the time to work through who you want to reach, what may interest them, and then creating a plan of engagement can generate the result that will grow your business.

Kai and the OceanIQ story is exactly how we have designed Clout. By utilizing a cutting-edge AI marketing engine that allows the activation of hyper-personalized and relevant content in marketing campaigns based on firm objectives, investments, or client segments. This helps advisory firms save a ton of time and effort as it learns from what works best and can sort through 100,000s of content pieces to recommend the next best action.

The best part of Clout? Our dedicated client success leads work hand-in-hand with each account. They learn the goal and objectives of the firm and help create highly engaging social media and email campaigns on behalf of the firm. The combination of the smart AI + and dedicated resources create a turnkey outsourced marketing team for a fraction of the cost of even a junior team member **(as low as \$13/day)**.

To learn more, visit TIFINWealth.com/Clout