

Customer Story

Top Three Wealth Management Firm Hires Evalueserve to Optimize Marketing Analytics



A global top three wealth management firm running a multi-channel demand generation program sought to optimize its digital marketing funnel and trends analysis.

With in-person events and one-on-one meetings severely limited by the pandemic, the firm increased its emphasis on attracting leads on quality investors through digital channels. They wanted to use their vast data to visualize the entire customer journey and scale their demand generation and marketing campaigns.

end-to-end data streams, the first of which would optimize its lead identification process. The firm wanted an improved process for identifying online leads and getting those leads to sales within 24 hours of the potential customer identifying themselves on the website.

The second major initiative sought to better leverage the firm's marketing data to produce decision-ready strategic insights. The project will analyze the incredible amount of marketing data the firm receives from various streams and identify new pertinent marketing strategies. Evalueserve analysts will point out key marketing campaign trends and visualize information in decision-ready reports.

Strong data foundation required across demand generation tactics

- Lead identification
- Buyer journey mapping
- Campaign triggers
- Lead prioritization and routing

The client turned to Evalueserve to optimize its lead funnel and marketing activities. Evalueserve's decision-based framework offered them an analyst-driven approach to artificial intelligence that would hasten their sales cycle and help them identify new customer acquisition trends.

The Goal

Growing digital demand generation

The wealth management firm sought to refine its data and insights to drive marketing strategy. They hoped to build two

Problem Solving with Evalueserve

Initial data challenges stall campaigns

The customer had the full gamut of

marketing data, but the larger end-to-end customer journey was not represented visually. Further, they wanted decision-ready insights, from lead-specific optimization to ROI analysis and strategic impacts. The firm wanted to apply stronger data governance and foundation and quickly implement solutions to address its lead funnel and marketing insights optimization.

Building a strong data foundation

Evalueserve began its work with the wealth management firm in 2019 when a former client joined the firm in a lead marketing role. This initial project built the confidence to invite Evalueserve to address the larger marketing data analysis challenges. In September 2021, the client selected Evalueserve to build the wealth management firm's digital marketing channel optimization solutions.

The Evalueserve team is:

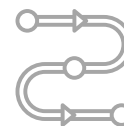
- **Cleaning data** from disparate sources - including website, email, marketing automation, and CRM tools - to accurately assess the customer journey.
- **Improving data governance** and the process of harmonizing 30 different sources into a single view.
- **Performing ROI analysis** by resolving attribution weighting within the customer journey, cost of campaigns, and cost performance.
- **Optimizing lead identification with AI** to hasten the sales cycle - deliver lead data, scoring, and prediction models to the right reps within 24 hours.
- **Visualizing data** to tell executives a clear insights-based story to inform marketing decisions.

Additional solutions included a trial for competitive intelligence insights.

Why Evalueserve?

The wealth management firm selected Evalueserve because:

- The team was already experienced with how Evalueserve analyzed campaign data and delivered decision-ready analytics.
- Evalueserve understood not only data but also the complexity of disparate financial marketing solutions from Adobe to Salesforce.
- Prior initiatives brought an experienced analyst and data engineering team with similar use cases in its portfolio to the table.
- Our flattened team structure allowed for transparency and blended knowledge sharing between marketing analysts and data engineers, increasing speed to market.
- Evalueserve's global nature brought the best assets and the right amount of resources to play regardless of location.



End-to-end teams for rapid deployment and support across the entire marketing function

Data engineers
AI/ML engineers
Data stewards
Data scientists
Visualization experts
Product managers

Talk to an Expert Today.

Connect with marketing and data experts at Evalueserve to discuss your team's goals and challenges. We'll show you how our data solutions can produce actionable insights and drive growth at your organization.

Get in Touch