

DRIVING 80% MORE FINANCIAL ADVISOR ENGAGEMENT

Basis drove an **80%** surge in new users for a Global 500 financial client with a precision-targeted, multi-channel campaign, showcasing the power of expert insights and data-driven activation in B2B marketing.

THE OBJECTIVE

A global financial services provider needed to boost awareness and engagement for its 529 savings plan among financial advisors. After previous disappointing results, they partnered with Basis to:

- Increase high-quality traffic and awareness
- Engage financial advisors to drive enrollment
- Improve key metrics like time on site and page views.

THE SOLUTION

Tailored Multi-Channel Strategy

Basis implemented a customized approach to drive quality site traffic and boost awareness of the client's 529 plan.

Improved Engagement

Focused efforts led to stronger metrics, including increased time on site and higher page views.

Strategic Alignment

By aligning with the client's goals and addressing financial advisors' needs, Basis transformed an underperforming campaign into a lasting success.

SETTING UP FOR SUCCESS



Data-Driven Strategy

Using audience insights, Basis tested and optimized platforms like Bing, Meta, DSP audio, and native buys, ensuring ads reached advisors in the most relevant environments with multiple touchpoints.



Expertise & Flexibility

Acting as an extension of the client's team, the Basis Consulting & Activation Team adapted to regulations, shifting business priorities, and real-time feedback to keep strategies aligned and drive better outcomes.



Clear, Actionable Insights

Integrating Google Analytics and platform metrics, transparent reporting enabled the client to track performance, justify budgets, and refine strategies.



Operational Excellence

Proactive problem-solving eliminated waste and optimized resources by resolving challenges like fraudulent traffic and tracking consent changes.

LASTING RESULTS



Performance Gains

Year-over-year increases in traffic, page views, and site engagement exceeded expectations without expanding the budget.

+105%

Page Views

+80%

New Users

+41%

Engagement Rate



Industry Recognition

Highlighted as "Best in Class" by LinkedIn for innovative strategy and execution.



Stakeholder Impact

The client shared that the campaign established a trusted solution for financial advisors and led to improved marketing performance and increased stakeholder satisfaction.