



Case Study - Union Financial Partners

www.ufpartners.com



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Executive Summary

Union Financial Partners Makes Significant Gains in New Market

Having several years in the business, Union Financial Partners decided to target a new market - professional, retired and young athletes. Having a background working with business owners allowed Ann Terranova, CEO and founder, to provide solutions to this new group that would aid in improving their financial condition for the rest of their lives. This was Ann's first targeted marketing project for her business.

155%

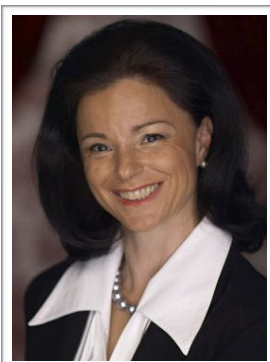
New users to website May 2015 vs May 2016

100%

Increase in traffic to website from Social Media year over year



Significant increase in inquiries & client load



“Working with Lisa and her team was a great experience. She was able to manage the project from start to finish while providing valuable insight into what was necessary to reach my new target market. Now I have more business than I’ve dreamed of!”

-Ann Terranova, Union Financial Partners

The Challenge

Ann desired a strategic view of marketing for this new target. She also desired one point of contact for all of the changes occurring: website, content, social media and blogging.

About the Client

With a strong financial planning business, including very little turnover and managing \$100 million in assets, Ann Terranova decided to target an under-served market - young, professional and retired athletes. Though her firm has been in operation since 1987, she still desires to grow, with the goals of doubling assets under management with the current amount of staff.

Ann's online presence had been overhauled by Abigail Gorton (<http://www.abigailgorton.com/>) and rewritten by Carolyn Kohler (<http://www.effective-web-sites.com/>) in July, 2015, traffic jumped her site.

Solution

After an assessment the following strategy was utilized, in this specific order:

The following took place in the month of January:

1. Website - look and feel updates, consistency updates.
 - a. New website pages added
2. Keywords defined for this new market
3. Web page content written and optimized for new target
4. Content Strategy: consistency in posting content to show client's expertise and build credibility.
 - a. Blog posts written by client and implemented by team
 - b. Promotion of blog posts to social media
2. NFL Retirement Report: a report written by Ann Terranova analyzing the NFL Player retirement report and suggestions for optimizing during sports career and second career and eventual retirement.
 - a. PR: press release with link to download NFL Report
 - b. Promotion on social media

Results

New users to www.ufpartners.com increased by 114% from December, 2015 to January, 2016. Her websites' SEO rankings increased dramatically, resulting in page 1 placement for the following 11 search terms:

1. financial advisor for retired athletes san francisco
2. financial advisor for retired athletes san francisco bay area
3. financial advisor for young athletes san francisco
4. financial advisor for young athletes san francisco bay area
5. financial planning for athletes san francisco bay area
6. financial planning for professional athletes san francisco
7. financial planning for retired athletes san francisco
8. financial planning for retired athletes san francisco bay area
9. financial planning for young athletes san francisco
10. financial planning for young athletes san francisco bay area
11. financial planning for professional athletes san francisco bay area

SUCCESS!

This resulted in an increase in direct traffic as well, showing that these people came back again and again to learn more from the interesting relevant content that was produced.

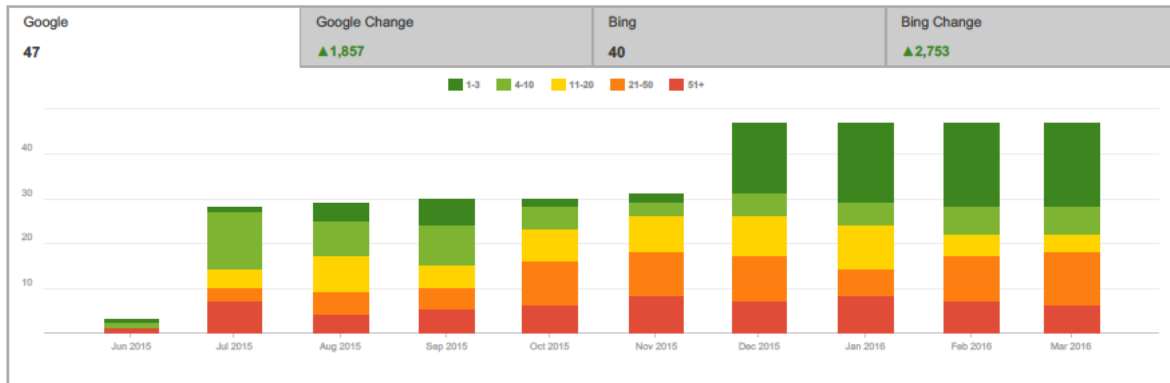
This project was given speedy attention, the Superbowl held in San Francisco was about one month away when we began the project.

Within 2 weeks of going live with the website and SEO changes, calls came in:

AgencyAnalytics

Union Financial Partners
July 04 2015 to March 04 2016

Rankings



Email from the client:

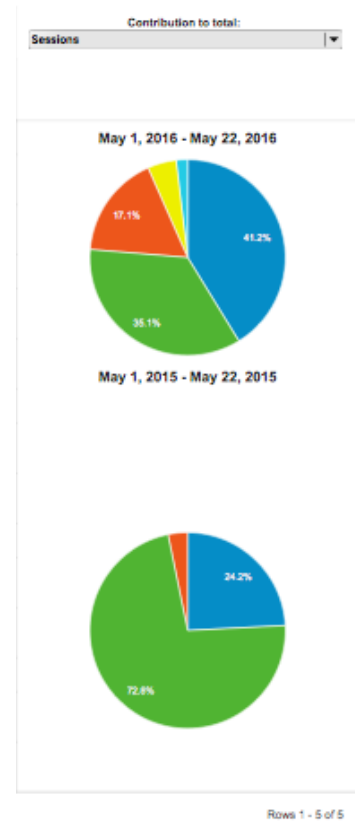
“When we started this there was a dearth of new prospects coming in.... This past week or so I’ve gotten

- 1 Inquiry from the NAPFA Find a Planner who I emailed and has not yet responded
2. One phone call from a guy – his friends told him he needed a fee only financial planner -who has an appointment on the 22nd –
3. Inquiry from the UFP Contact Page – she has an appointment on the 22nd as well.
4. Just got an email from a guy wanting to come in and make an appointment

This influx continued well into April and May. Her regular client load has increased from 2 - 3/ month to writing 7 financial plans in May!

Website Referral Traffic - Comparing May 2015 to May 2016

Direct (going directly to website)	64% increase
Referral (links from other sites)	480% increase
Organic Search (keywords)	1700% increase
Social Media	100% increase
Press Release	100% increase
Website total users	155% increase



Are you in the need of a marketing strategy to reach your target market and grow your business?

[Sign up for your FREE Idea Session with Lisa](#)