

IntelliClick

CASE STUDY

InKnowVision, A Financial Services Marketing Firm, Develops a Wealth of Information It Can Act On.

"The use of IntelliClick has generated real business for advisory services offered by InKnowVision." Scott Hamilton, President, InknowVision.

Company Profile: InKnowVision, based in Naperville, IL, is a national consulting and marketing firm that is a leader in the design and development of wealth transfer planning and income tax solutions for independent advisors who serve affluent families. InKnowVision collaborates with legal and financial professionals throughout the country to develop solutions for their clients who have an average net worth of over \$20M. The company's largest planning engagement has been with a real estate client whose assets had a total market value in excess of \$500M and whose net worth was estimated to be in the \$200M range.



InKnowVision
INTEGRITY, KNOWLEDGE, VISION

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Business Need: Harness The eMarketing Power Behind 50,000 Contacts In InKnowVision's GoldMine[®] CRM Database.

Business Solution: IntelliClick eMarketing Integrated With GoldMine[®] Corporate Edition

InKnowVision, a small niche marketing firm established in 2001, provides back end financial planning resources to wealth management firms and law firms that cater to high net worth clients. InKnowVision has been using GoldMine for the last 8 years. InKnowVisions' President, Scott Hamilton, had been looking for a tool to get more marketing muscle out of its GoldMine CRM database.

Scott began researching how the firm could integrate its existing eMarketing plans with their CRM solution to develop existing relationships, generate more qualified leads & close more sales. In October of 2008, Scott learned about IntelliClick, and discovered that he could use IntelliClick to seamlessly integrate email click tracking results in GoldMine. By updating a special tab in GoldMine[®], with the click results of his educational eNewsletter and eWebCast emails directly sent from GoldMine[®], Scott has developed a wealth of information that InKnowVision can immediately act upon. InknowVision also alerts their sales team to prospect and customer interests, as well as placing prospects into specific drip marketing tracks enabled by the automated process (AP) capabilities of GoldMine[®].

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Scott acted on his IntelliClick plans quickly, and created email templates and incorporated IntelliClick hyperlinks. For example, if a financial advisor or prospect clicks on one of the specially inserted IntelliClick hyperlinks in their email to register for InKnowVision's monthly "case study" newscast, then the recipient will automatically receive a personalized GoldMine email communication that attaches the case study in PDF format; places the prospect on a landing page to register for the webinar; and sends them an email confirmation that they have been registered for the webinar. IntelliClick does this automatically, without having to tap into any of InKnowVisions' valuable staff resources.

In addition, a marketing executive in Scott's organization is alerted that someone has registered for the monthly telecast, and a call is scheduled for the sales executive to contact the advisor and discuss how they can use the webcasts to generate business as well as nurture advisor relationships. Also, the email recipient is automatically placed into a "Webcast" AP track in GoldMine, by using the field write back capability of IntelliClick, and then will continue to receive monthly educational articles and case studies. The use of IntelliClick has generated real business for advisory services offered by InKnowVision, Scott casually mentions.

But, InKnowVision doesn't stop there....Now that InKnowVision owns a life insurance company, and has recently begun marketing its new financial services product, it prepared a AP track in GoldMine, that gets triggered when the IntelliClick field write back is populated with a value indicating that a financial advisor has clicked on InKnowVisions insurance product information. From there, the AP places these prospects on a 6 week "sales" drip marketing track and schedules a next action to send a direct marketing mailer. Scott already has the "Intelligent" click tracking links in IntelliClick sending a text message to the sales executive to alert them of a prospect's interest as well as scheduling a phone call in GoldMine.

He has also respected "opt out" requests for both the eMarketing newsletters and promotional email tracks by providing specially inserted IntelliClick "unsubscribe" hyperlinks that update custom mailing fields in GoldMine. An AP scans and watches for a change in any of these fields to remove an email track, if needed.

InKnowVision's Vision:

What does this all add up to in dollars and profit?? Scott shared with me his own ROI (return on investment) analysis. He calculated that he is spending \$11,000 annually to bring in \$20,000 annually, for one product and one sale; and, that annual cost factor keeps going down, since client retention costs are less than new business acquisition costs. Not bad for what he calculates as pure profit of \$9,000 per sale generated by one specific eMarketing track set up using IntelliClick and GoldMine APs. The IntelliClick portion of this cost is an affordable \$1,000 annually, according to Scott's calculations, since he only pays if someone actually clicks on his email hyperlinks.

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In one of his recent email marketing campaigns, Scott indicated that he was able to generate 100 highly qualified leads sent to about 18,000 prospects. And how many leads turned into proposals? After only two weeks, InKnowVision generated 6 proposals and closed 1 contract; and Scott's sales team hasn't been able to get through all those leads yet!

Where is InKnowVision going next with the use of IntelliClick? Scott tells me that he intends to begin exploring IntelliClick's web visitor navigation tracking capabilities. This will allow Scott to track exactly where his prospects have gone on the InKnowVision web site once they have clicked an email hyperlink in their messages. All tracked web page visits end up automatically on the ClickTrak tab in GoldMine[®] as well. These can then be isolated for further AP "drip marketing" campaign tracks and help Scott determine which areas of his website are generating the most interest.

About Business Automation Solutions, Inc.

Business Automation Solutions, Inc., the developer of the IntelliClick eMarketing software, is a sales, marketing and relationship technology solutions consulting firm, and CRM integration specialist. The firm integrates its' IntelliClick eMarketing application with well known CRM solutions, such as Sage ACT! and GoldMine as well as ESP's (Email Service Providers) such as iContact and Constant Contact. IntelliClick is marketed globally and customers span a variety of industries including financial services, human resources, manufacturing, software, marketing services, transportation, security services and broadcasting. Business Automation Solutions is headquartered in Chicago, IL. For more information, visit www.intelliclicksoftware.com or call 888-827-5628.