

# Act-On Helps Trungale Egan + Associates (TE+A) Increase Customer LTV and Drive Client Success

The modern marketing agency needs a marketing solution that can win new business effectively and be easy to leverage on a client's behalf. Trungale Egan + Associates (TE+A) found just such a platform in Act-On Marketing Automation – today the cornerstone of its managed services package. With Act-On, the mid-sized Chicago-based agency has been able to extend and enrich the overall lifetime value (LTV) of its customer relationships, retaining clients for an average of 7–10 years – nearly twice the length of the typical agency-client relationship. The agency has also managed to deliver outstanding results and improve satisfaction across its client base. In one case, integrated programs for Nepsis Capital Management that ultimately helped the company triple its radio audience, see an average email click-through rate of 16%, and a boost in landing page click-through rates as high as 80%.



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**BRAD FELDMAR**

Executive Vice President of  
Business Development

# Challenge

When it first opened its doors 25 years ago, TE+A had a lot in common with Sterling Cooper, the advertising agency at the center of the AMC show *Mad Men*: a slew of talented copy writers and designers, and a reputation for developing powerful brands and stellar creative. But there eventually came a time when the agency had a hard choice to make, just as Sterling Cooper did: evolve with the times, or fall behind. The air cover of old – magazine ads, billboards – quickly gave way to digital channels: websites, email campaigns, social media. TE+A was keen to embrace these changes, and realized that its best hope of expanding client services and preserving value lay in digital marketing.

This decision was made with one of the agency's main customer verticals in mind: the wealth management advisor, whose typical prospect was someone preparing for retirement. Historically, these advisors have relied on word-of-mouth and referrals to grow their business. But as technologies have multiplied, so, too, have avenues for investigation and research. Baby boomers and their heirs now head online to shop and seek counsel – about their finances especially – and TE+A was eager to help advisors reach them, via digital marketing.

“When it comes to segmented, online marketing, most businesses in the wealth management industry are behind the times – often a decade or more,” said Brad Feldmar, TE+A's Executive Vice President of Business Development. “If our clients didn't have a digital marketing strategy, they weren't just leaving money on the table, they were making themselves vulnerable as the technical savvy of their audience increased. We saw marketing automation as a wonderful opportunity to help our clients meet a growing need.”

TE+A and many of its clients were mostly using ESPs like Constant Contact and MailChimp, but Brad wanted something more sophisticated – something all clients could benefit from, and something that integrated easily with their websites and CRM systems (like Salesforce). This platform would also need to provide a broad range of marketing capabilities and support integrated campaigns. “We looked at a number of vendors, including Marketo and HubSpot, but we really needed a platform that enabled a multi-channel approach,” Brad said. “The inbound piece just wasn't enough.”

Most crucially, the system TE+A chose would have to fully support its own marketing efforts. “Like most agencies, many of our clients would stay with us for two or three years, and then move on,” he said. “We wanted a platform that expanded our own ability to attract and retain clients.” Act-On ticked many of these boxes, standing out for its ease-of-use, rich feature set, and integrated workspace functionalities to support brand, demand, and expand marketing efforts.



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# Solution

Act-On went to work right away for the agency. TE+A started using the platform to announce and welcome new clients by email, and showcase its work: a website it designed, a rebranding project it completed. The agency also turned to Act-On to promote webinars and live events. “We attend a lot of tradeshow, and we’ll use it to drive traffic to our booth, and then follow up with attendees,” Brad said. “Act-On has made it easier for us to stay top of mind with prospects and current customers.”

Act-On also helped TE+A win and service new clients. As a managed services agency partner, TE+A received both its own instance of Act-On and an instance provisioned for its clients. Brad has leveraged this additional option by creating a service around Act-On called Automated Marketing Platform, or AMP. When a client purchases AMP, Brad uses Act-On to create and manage integrated campaigns that help the client generate leads and retain customers. It’s a brilliant use of technology as a service.

“Act-On has given us a way to engage prospective clients who say they don’t need help with branding or messaging, or who already love their website,” Brad said. “Five years ago, we didn’t have much else to pitch. Now we can offer AMP as a sophisticated way to digitally promote their business. Act-On has helped us create an entirely new sales channel.”

Brad said Act-On makes AMP very appealing to his clients, especially those in financial services. “Many of our wealth management clients use Salesforce, and were previously using Constant Contact, but were frustrated by their inability to import contacts into it,” Brad said. “They love Act-On’s seamless integration with Salesforce, and its robust list management capabilities. Act-On has made AMP an easy sell.”

TE+A clients agree – nearly one-third of them now use AMP to grow their business. One such client is Nepsis Capital Management, an asset management firm founded and led by Mark Pearson. Like most wealth management professionals, Mark knows that trust and rapport close deals. But unlike many of his peers, Mark also recognizes marketing’s role in nurturing prospects, and he relies on TE+A and Act-On to see his customers through.

“Mark realizes that personal referrals are no longer enough. He understands the value of engaging and nurturing leads, and has fully embraced digital marketing to accomplish it,” Brad said. “We’re producing new collateral for him every week – email campaigns, targeted Facebook ads, even a radio show. And every single one of these has Act-On in the middle of it.”



Facebooks ads that drives users to a landing page are one way TE+A captures leads for Nepsis. The average click-through rate for the ads is a robust 7.2%, and for the landing pages an even more impressive 27%.

# Results

TE+A has seen improvements on all fronts as an Act-On Managed Service Partner.

“Having Act-On and AMP makes us very attractive to prospects who want help with demand generation and customer retention, and it’s a great upsell to clients who initially hire us for branding and messaging,” Brad said. “We’re engaging our AMP clients almost every day – making adjustments to the content and programs in response to the data we get from Act-On. The average client-agency relationship ends after 4-5 years, but ours last upwards of 7-10 years. **Act-On has nearly doubled the LTV of our customers – a remarkable increase that has greatly impacted our bottom line.**”

Clients like Nepsis have reaped the rewards. TE+A has used Act-On to send more than 400,000 emails on Nepsis’s behalf, with a 16% average click-through rate, and has also created 40 dedicated landing pages in the platform, with an average click-through rate of 27%. “With Act-On, we can create rich campaign flows that start a dialog between Nepsis and their prospects,” Brad said. “And Act-On’s reports have helped us optimize the campaigns and lower the CPC by nearly 50%.”

Act-On has also enabled the agency to better integrate and streamline its cross-channel efforts at brand awareness. Emails and Facebook ads around the microsite for Nepsis’ radio show led to a more than 300% increase in unique visitors.



*TE+A nurtures Nepsis prospects with Act-On emails that deliver blog posts and other valuable content. The campaigns generate a striking 16% average click-through rate.*

The landing page for the “Investment Stress Test” has seen a click-through rate of 80%.

Television’s Mad Men may fade with time, but with Act-On at its side, TE+A is poised to thrive for their next 25 years and beyond. “Act-On has streamlined our workflow and drastically reduce development time for all HTML based content. We can create and deploy multi-channel campaigns within hours, not days, and seamlessly integrate our activities with our clients’ CRM. And with Act-On’s reports, we can regularly measure and optimize our work – even on a daily basis,” Brad said. “Through it all, Act-On has delivered exceptional customer support. Partnering with Act-On has been a tremendous investment for our firm.”

## About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

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