

How Finzly used Willow & Bee to improve lead results and reduce costs

THE CHALLENGE

[Finzly](#), a prominent Series A payments technology company, sought assistance from [Willow & Bee Marketing](#) to address various pressing marketing needs. These included optimizing and streamlining their HubSpot database, enhancing reporting capabilities, and refining the efficiency of their marketing campaigns.

DISCOVERY

Uncovering opportunities

Taking a hands-on approach and reviewing the entire marketing process from the strategic perspective of driving more contributions to pipeline revenue and achieving business goals, Willow & Bee quickly identified **five** critical areas of improvement necessary for Finzly:

- 1) more effective funnel management and lead scoring,
- 2) multiple database optimizations,
- 3) refined persona-based messaging,
- 4) analytics and reporting designed for specific stakeholders, and
- 5) better organization and processes.

About Finzly

Finzly, a Series A fintech founded in 2012, empowers banks to provide modern financial services through a number of integrated and advanced banking solutions.

KEY RESULTS



20% increase in email open rates

3x improvement in ad clicks from valid leads

7K invalid leads found and replaced

3x improvement over target webinar registration rates

"Willow & Bee helped Finzly improve its lead generation programs at both the strategic and tactical levels. Their work enabled us to have greater visibility into our program results, which allowed us to improve continuously."

Their help in developing automated workflows, persona-based segmentation, and utilizing intent data has brought the maturity of our digital marketing to a new level."

- George Ravich, Former Fractional CMO, Finzly

HOW WE DID IT

1

Funnel management

Starting with defining funnel stages, creating process steps, and outlining criteria, we provided Finzly with a consistent model to implement across the organization.

Finzly gained a much clearer view of their prospects in the buyer journey, allowing their Sales team to save valuable time by focusing on those deeper in the buying funnel.

Next, we optimized and enhanced the lead scoring methodology to automate funnel conversions and drive more qualified leads to Sales.

2

Database optimizations

We identified 7,000+ unqualified leads identified as marketing contacts in HubSpot, which means that Finzly was spending budget dollars on these non-prospects.

By optimizing the database, Finzly was able to save \$\$\$ and improve conversions.

3

Personas and Intent data

By utilizing persona-based marketing and incorporating first-party intent data, we created segmented contact lists for use in upcoming ABM campaigns.

The strategy behind these lists also became a template that Finzly could use to replicate for future campaigns and incorporate into their reporting and analytics.

Next, we designed a content calendar and a nurture strategy by persona, creating a series of drip emails and social messaging scripts.

New campaigns highlighted key messages into target accounts for Account-Based Marketing (ABM). LinkedIn and Google search ads were re-strategized and re-written, featuring messaging crafted for individual personas and accounts.

Improved reporting

Finzly needed a better way to accurately track program results, analyze multifaceted campaigns, and present those results to different stakeholders.

We designed custom dashboards for various levels, offering higher views or deeper insights into lead sources and funnel conversions where needed.

For example, a high-level dashboard enabled executives to quickly see important, relevant metrics daily. Data-driven decision-making became more seamless, and insights were revealed through previously unseen trends and analysis.

4

5

Better organization

We mentored the Finzly marketing team with best practices, helping the business create new organizational processes, including checklists and schedules to follow, designing naming conventions for marketing lists and campaigns, and enabling more streamlined workflows.

RESULTS

- Qualified registrants for virtual events surpassed goals by 3x
- HubSpot utilization improved, making workflows more efficient and reducing wasted spend on non-viable leads
- Emails saw 10-20% increases in open rates and increased engagement
- Campaign performance increased and new strategies align with business goals
- Custom dashboards provided actionable insights

SUMMARY

This comprehensive engagement covered several enhancements to Finzly's overall marketing strategy and performance to their great satisfaction.

The partnership between Willow & Bee and Finzly exemplifies the impact of an effective strategic marketing consultant on transforming a company's marketing efforts.

