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intelliflo’s first-ever omnichannel digital marketing campaign

intelliflo dominates the UK with over 50% market share in financial advice technology—yet just two years ago, it was virtually unheard of in the U.S. Acquired by Invesco in 2018, intelliflo is now on a mission to transform access to financial advice through intuitive, scalable tech built for modern advisors.

The U.S. marketing team was strategically assembled under my leadership in mid-2022 with the understanding that the U.S. is a critical growth market for intelliflo’s future. The markeitng team quickly got to work, transforming a previosuly stagnant function and modernizing the marketing organization into an efficient lead-generating machine.

Our first-ever **omnichannel marketing campaign** launched in Q1 2023 to introduce and elevate *intelliflo redblack*—our award-winning rebalancing and trading solution—in the competitive U.S. market. Unlike traditional multi-channel efforts, this campaign was designed to deliver a **seamless, integrated experience**, making it easier for advisors to connect, engage, and act. But with low brand awareness and a crowded fintech landscape, we knew we couldn’t rely on table-stakes tactics. Most competitors were selling speed. Our 40+ hours of market and persona research revealed a deeper truth: advisors didn’t just want faster rebalancing—they wanted **scalability, simplicity, and peace of mind**. Many were still juggling spreadsheets or outdated systems, not because they wanted to, but because they hadn’t seen a platform that truly helped them grow.

So we **repositioned intelliflo redblack** from a back-office utility to a **strategic growth partner**—one that helps advisors scale smarter, serve faster, and sleep easier. That insight fueled a bold new brand refresh and message architecture focused on education, relevance, and trust. The campaign launched across 15 channels—**12 of which had never been tested at intelliflo before**—and included over 400 creative assets tailored by persona, funnel stage, and channel. We also built **50+ new pieces of content** including workflow guides, ROI calculators, and thought leadership to support the full buyer journey. To extend our reach, we established **third-party partnerships** that allowed our lean team to scale impact without scaling headcount. This was more than a campaign—it was a full-scale market reintroduction. It redefined the category conversation and helped advisors reimagine what rebalancing could do for their business.

One partner told us our creative “didn’t look like fintech—it looked like the future of advice.” The impact? A 25% YoY revenue jump in the U.S., a 3x lift in demo volume, and a meaningful shift in how the market talked about us: no longer as a back-end tool, but as a front-office accelerator for growth-minded firms.

The campaign led to significant full-funnel U.S. marketing-driven results for the business:

- **Explore**:
  - Impressions - 167% to plan
  - U.S. website visits - 354% to plan
  - U.S. LinkedIn follower growth - 220% growth YoY
- **Consider**:
  - U.S. marketing qualified leads - 129% to plan (500% year-over-year growth)
  - U.S. sales qualified leads - 119% to plan
- **Decide**:
  - 60%+ of closed-won deals were marketing-driven (typical B2B average is around 30%)

The team also spotted an opportunity to innovate using dynamic creative optimization (DCO) as part of the first-ever omnichannel campaign. Given we target advisory businesses/financial advisors with certain levels of assets under management (AUM), the team leveraged DCO ads for states and cities with the highest concentration of firms by AUM, leading to more pinpointed effort with

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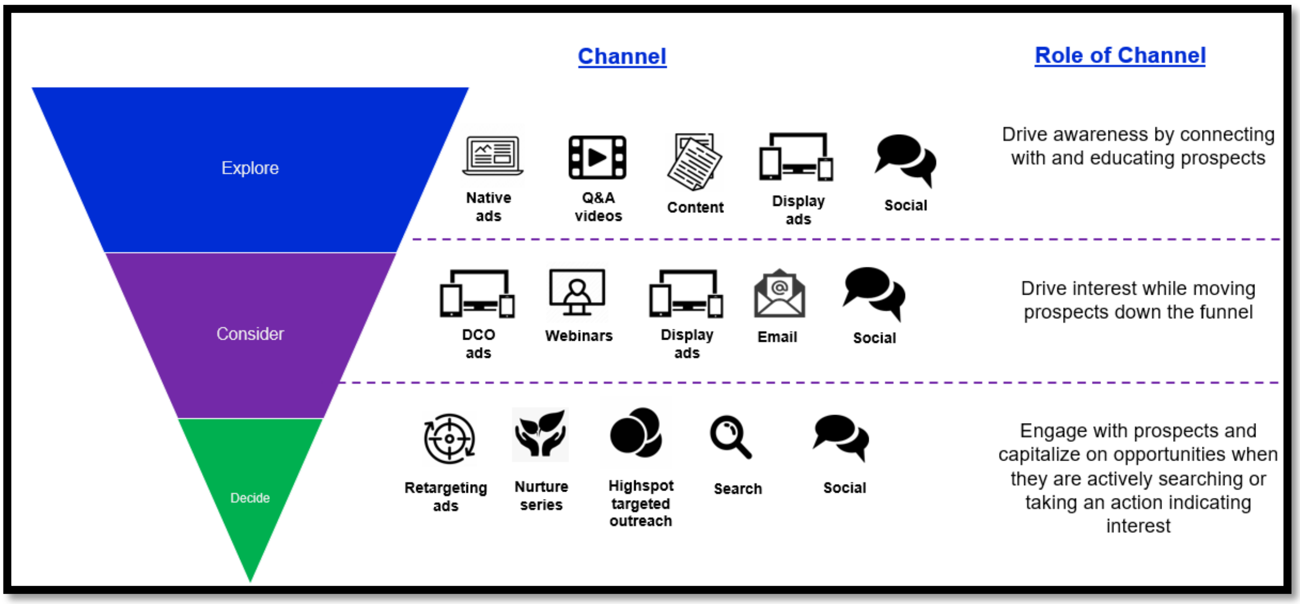
less waste. DCO marketing uses technology to match the best-suited ad creative to the user based on specific criteria.

This campaign continued year-after-year with updated copy, optimizations, and learnings to make an even bigger impact!

Channel strategy overview



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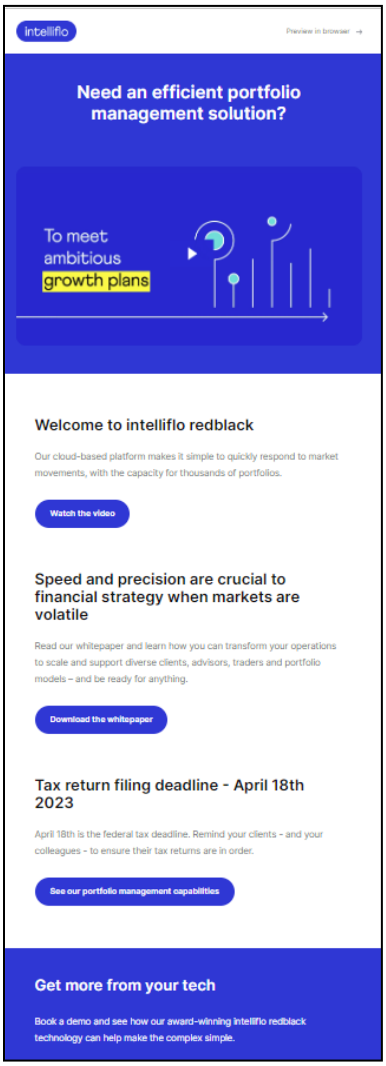
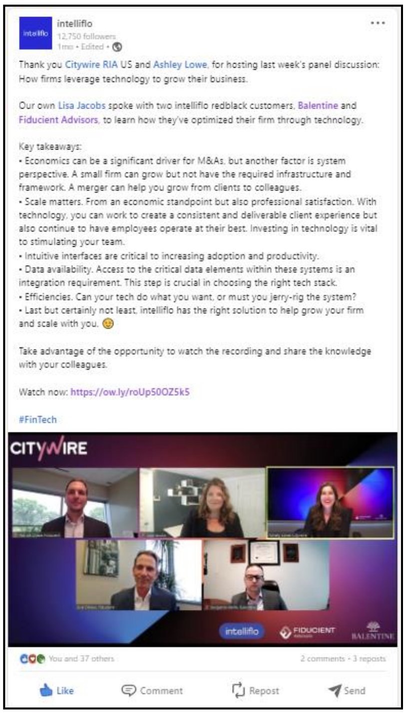
Campaign demand gen email sample:

Subject line: Hello, intelliflo redblack



Organic social media post samples:

https://www.linkedin.com/posts/intelliflo_delivering-value-intelliflo-redblack-activity-7086721884771291136-41xg?utm_source=share&utm_medium=member_desktop



https://www.linkedin.com/posts/intelliflo_fintech-activity-7079835849428717568-P9UN?utm_source=share&utm_medium=member_desktop

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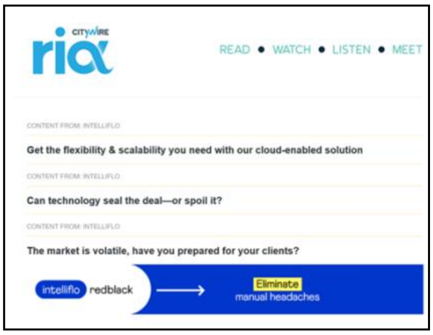
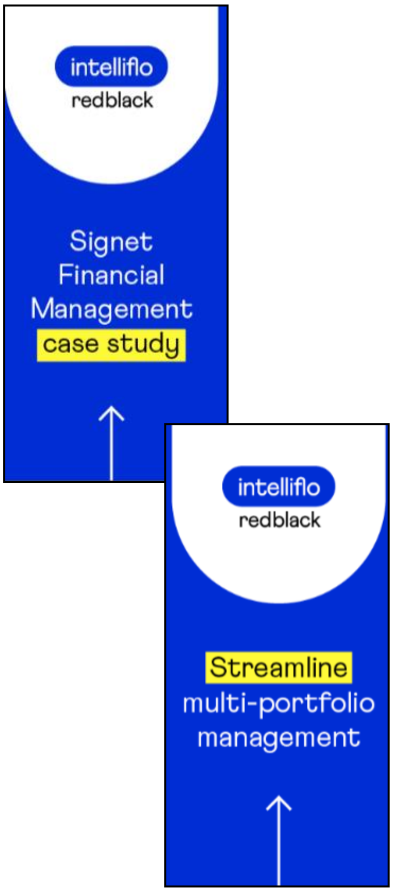
Third-party partner campaign samples:



Display ad samples (static):



LinkedIn awareness sample:

LinkedIn lead gen sample:

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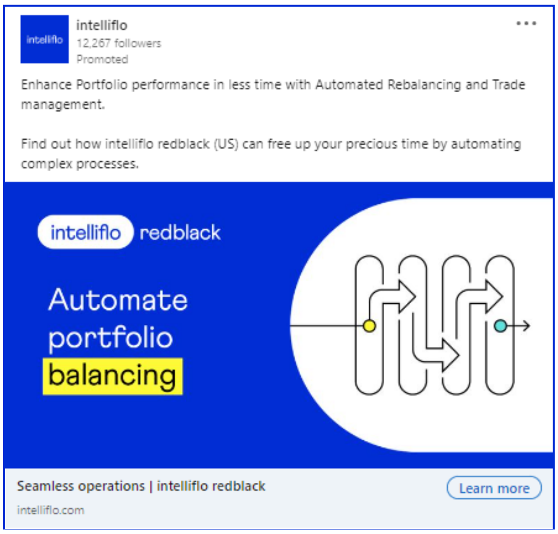
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Enhance Portfolio performance in less time with Automated Rebalancing and Trade management.
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This whitepaper examines more investor trends that are shaping the future of wealth management.
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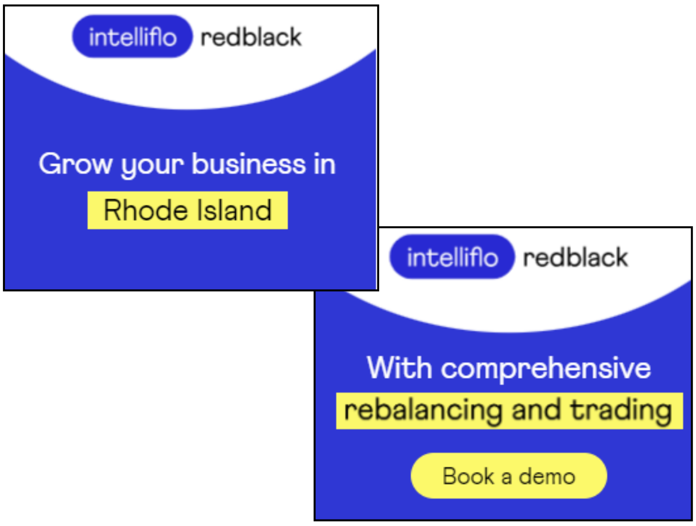
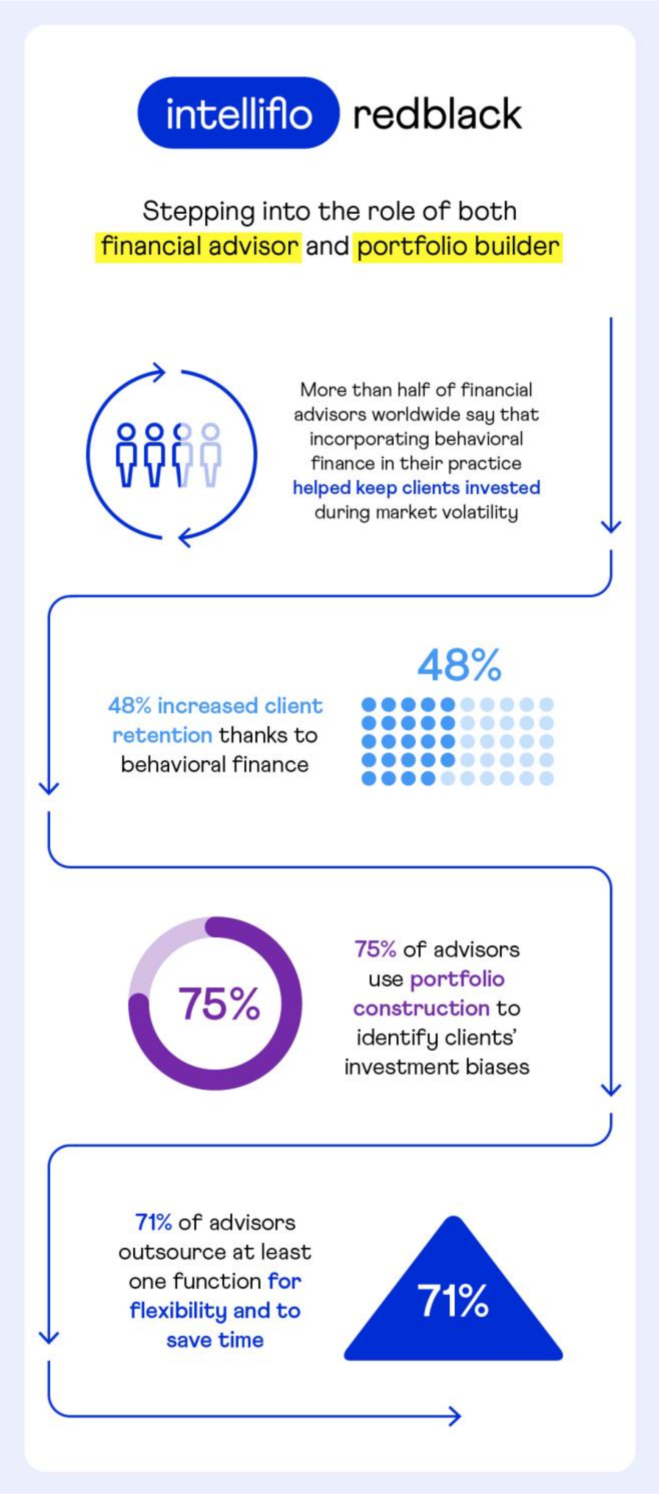
Animated DCO sample:



Infographic sample:



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Nurture email series sample:

Six-series nurture email series targeting engaged leads

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Content samples (articles, whitepapers, videos, etc.):