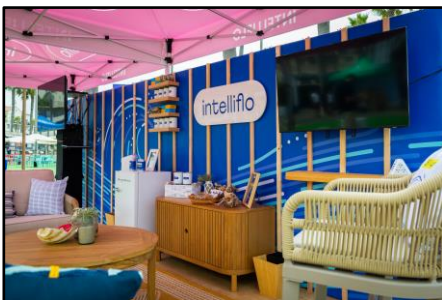


From Ripple to Tidal Wave: intelliflo's Future Proof Festival Triumph

Picture this: The sun-drenched shores of Huntington Beach, California, where the waves crash and innovation surges. It's here, at the Future Proof Festival, that intelliflo's remarkable journey unfolded—a tale of transformation that would redefine the landscape of wealth management marketing.

Three years ago, intelliflo arrived at Future Proof with a modest booth, a newcomer, just like the others in Festival's inaugural year, testing the waters of this unconventional fintech gathering. As the tides of change swept through the industry, intelliflo's presence evolved, riding the waves of innovation with increasing confidence and creativity.

By 2024, intelliflo had metamorphosed. No longer content with the status quo, the company unleashed a marketing tsunami that would leave the industry in awe. Gone was the traditional booth, replaced by a bespoke space dreamed up by a local Los Angeles set designer that pulsed with energy and innovation. This wasn't just a display; it was an immersive brand experience coupled with a digital omnichannel campaign that embodied intelliflo's audacious vision for wealth management's future.



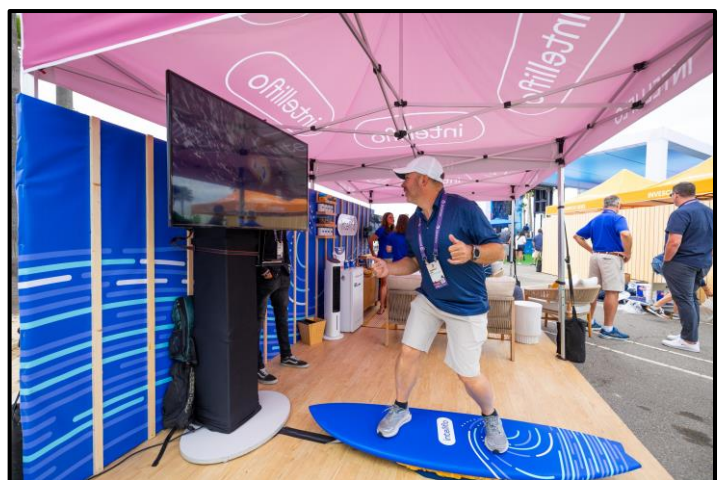
At the heart of this transformation stood the *pièce de résistance*—a virtual surfboard that perfectly blended the beachfront allure of Huntington Beach with cutting-edge technology. As attendees lined up to "catch a wave," little did they know they were being swept into intelliflo's world of financial technology innovation.

By combining physical design with a robust omnichannel campaign,

intelliflo created a multi-faceted approach to showcase their brand identity. This strategy not only captured attention at the event but also extended their reach beyond the physical space, amplifying their message across various digital platforms. The result was a marketing initiative that left a lasting impression on industry professionals and potential intelliflo customers alike, positioning intelliflo as a trailblazer in the evolving landscape of wealth management.

The Evolution of Excellence

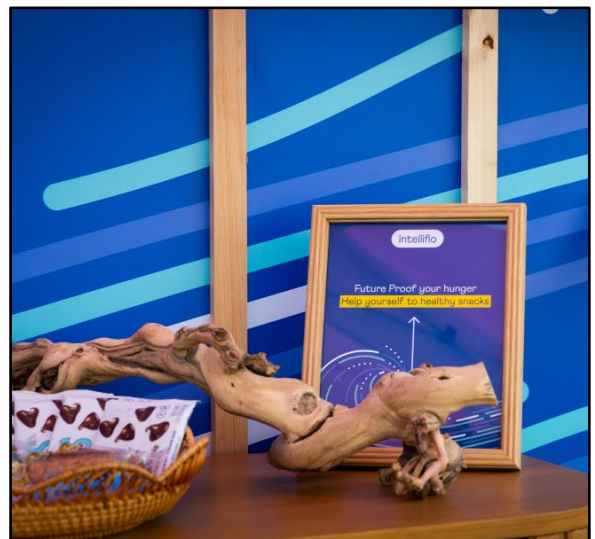
From a humble booth in year one to a fully immersive brand experience and campaign in 2024, the company's presence evolved with purpose and precision. The culmination of this three-year journey was a bespoke space and omnichannel approach that didn't just attract attendees—it enveloped them in the intelliflo experience.



A Physical & Digital Tsunami of Engagement

The 2024 campaign was a perfect storm of physical & digital innovation and creative marketing:

- **Custom-Designed Space:** A local L.A. set designer transformed intelliflo's event space into an innovation hub that invited exploration and fostered meaningful connections to serve as the centerpiece of the entire campaign
- **Virtual Surfboard Simulator:** This iconic attraction became the talk of the festival, seamlessly blending the beachfront ambiance with intelliflo's technological prowess
- **Live Demo Zone:** Attendees had the opportunity to experience our solutions firsthand in an intricately designed demonstration zone, meticulously created through collaboration with our solutions experts. This interactive space showcased our SaaS offerings in action, allowing visitors to gain a deeper understanding of our rebalancing and trading capabilities
- **Digital Omnichannel Strategy:** From a dedicated website that featured pre- and post-event messaging to targeted email campaigns and social media promotions, intelliflo's digital presence was as dynamic as the ocean itself
- **Digital print ad with The Wealth Advisor:** intelliflo strategically placed a [branded ad](#) in The Wealth Advisor's print and digital editions just before the Future Proof Festival, featuring a QR code linking to a custom event webpage. This multi-faceted approach boosted brand visibility, promoted the event, and extended reader engagement by seamlessly blending traditional and digital advertising methods
- **Content Creation:** Innovative videos, including [recaps](#) and three interviews with the Festival's [CEO](#), Matt Middleton, provided engaging content for digital marketing efforts
- **Social Media Amplification:** A [takeover](#) of intelliflo's global X account by the Head of US Marketing resulted in a staggering 10X growth in impressions
- **Social Media Advocacy:** Our social media strategy also utilized Oktopost, a social media engagement and employee advocacy software, to amplify our Future Proof presence. Attendees received 6 pre-written, event-specific posts to share easily on their LinkedIn accounts via mobile devices before, during, and after the event. This approach turned attendees into brand ambassadors, expanding our digital reach beyond the event. The user-friendly system and curated content ensured consistent messaging and boosted engagement, significantly extending our impact in the wealth management community
- **Media:** Our outreach to digital media partners yielded impressive results. An [Advisorpedia](#) article highlighted key takeaways from the event, providing insightful analysis and extending our reach to their readership. We also secured an on-site interview with [StreetCredPR](#), offering an opportunity to showcase our innovative approach in real-time. Furthermore, we caught the eye of [InvestmentNews](#), one of the wealth management industry's most respected publications, which featured a Q&A article promoting our onsite discussion with their editor at Future Proof



Riding the Digital Wave

intelliflo's digital integration strategy was comprehensive and seamless:

- **Pre-Event Buzz:** A dedicated landing page (www.intelliflo.com/futureproof) served as the central hub for pre-event excitement and post-event recaps and continued engagement
- **On-Site Digital Mastery:** Lead capture was streamlined through a Marketo landing page and lead scanners, while the Virtual Surfboard Simulator doubled as an engagement tool and data collection powerhouse
- **Post-Event Nurturing:** Personalized follow-ups and retargeting campaigns ensured that the connections made at Future Proof continued to flourish long after the event ended



Innovation That Made Waves

Creativity was the undercurrent that propelled intelliflo's campaign to new heights:

- **Branded Merchandise:** From ice-cold canned water to Goodr sunglasses in intelliflo blue to custom-branded pillows to even intelliflo-blue polos, every item reinforced brand recognition in a fun, memorable way
- **Open Concept Design:** By eschewing the traditional booth for an open, welcoming space, intelliflo created an environment that encouraged deeper conversations and community building



Measurable Success: The Tide Rises

The results of intelliflo's campaign were as clear as the California sky:

- 81% increase in opened opportunities year-over-year
- 133% increase in qualified opportunities year-over-year
- A major customer win within two months of the event
- 10X growth in social media impressions through X takeover
- Climbed from 12th to 2nd place in top-of-mind unprompted recall in our latest US Brand Tracker results



These metrics weren't just numbers; they were a testament to the campaign's effectiveness in driving real business growth and enhancing brand visibility.

A Call to Action That Resonated

Throughout the campaign, intelliflo's calls to action were as inviting as the ocean itself:

- On-site, attendees were drawn to try the virtual surfboard or to watch a live demo at our booth
- Digital CTAs before and after the event guided prospects towards scheduling meetings or exploring solutions online via our dedicated landing page

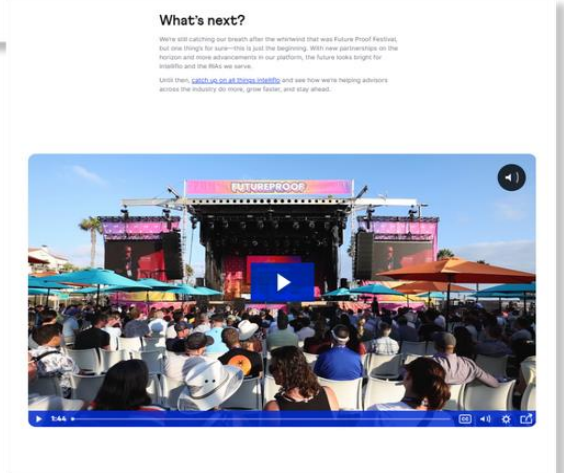
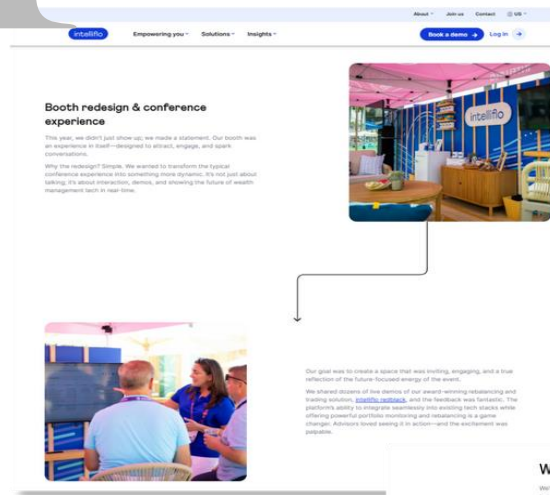
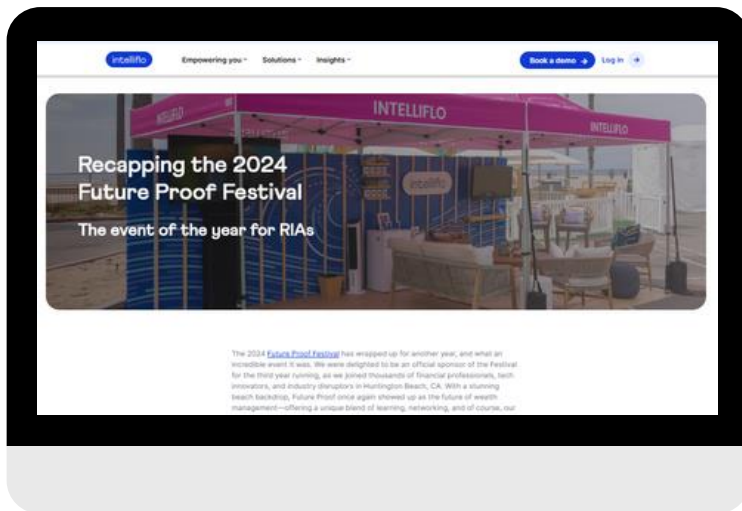
These strategic prompts were crucial in transforming festival excitement into tangible business opportunities.

In conclusion, intelliflo's 2024 Future Proof Festival campaign wasn't just a marketing effort; it was a digital revolution in the wealth management industry. By seamlessly blending creativity, technology, and strategic engagement, intelliflo didn't just participate in Future Proof—they redefined what it means to make waves in financial technology marketing. This campaign stands as a beacon of innovation, lighting the way for others in the industry and solidifying intelliflo's position as a true leader in the digital age of wealth management.



Digital Omnichannel Overview

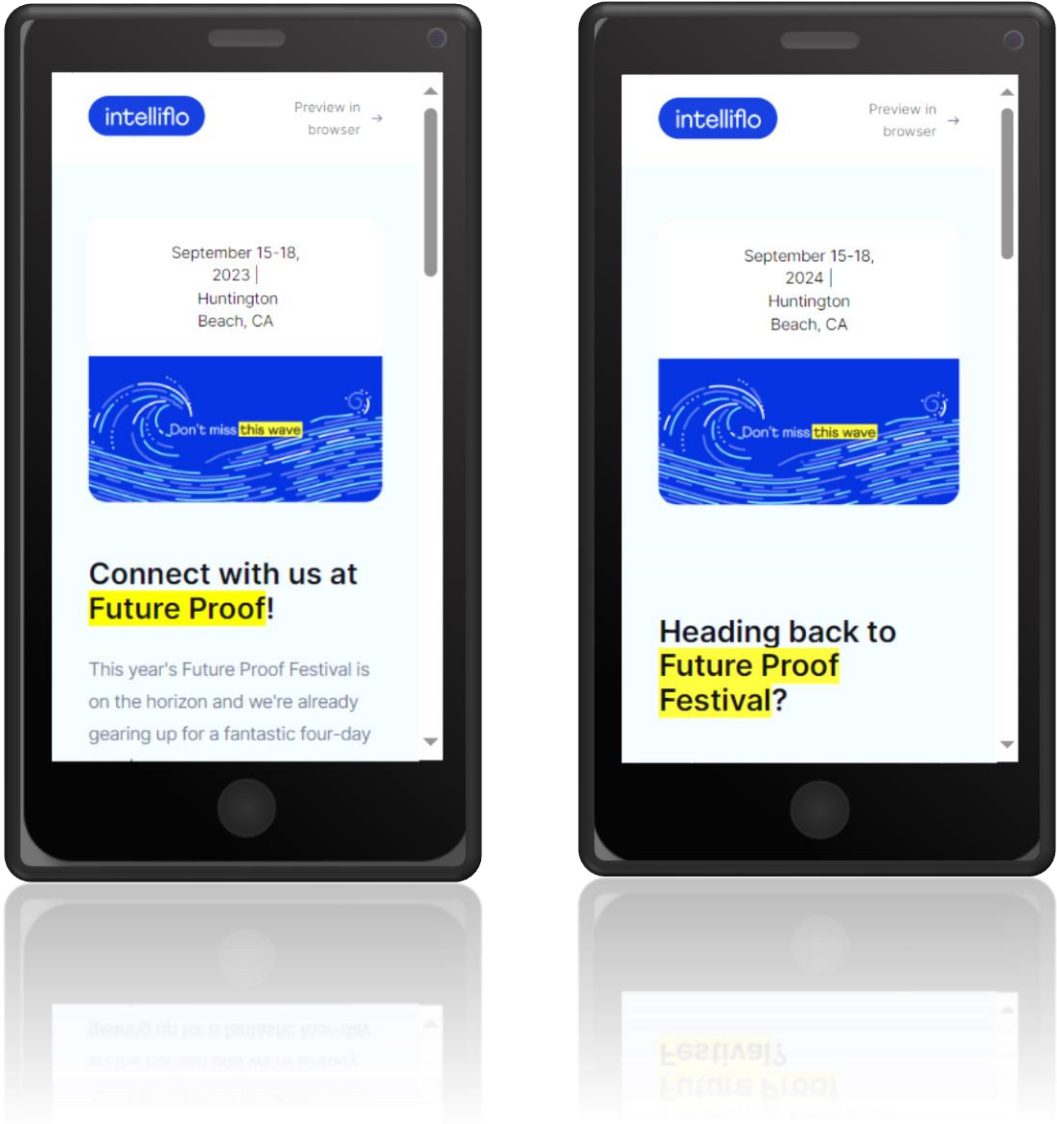
- Dedicated landing page:**
 - A unique and personalized Future Proof Festival landing page that offered a thorough overview of what to expect pre-event and transitioned to a recap focus post-event to ensure seamless engagement: www.intelliflo.com/futureproof



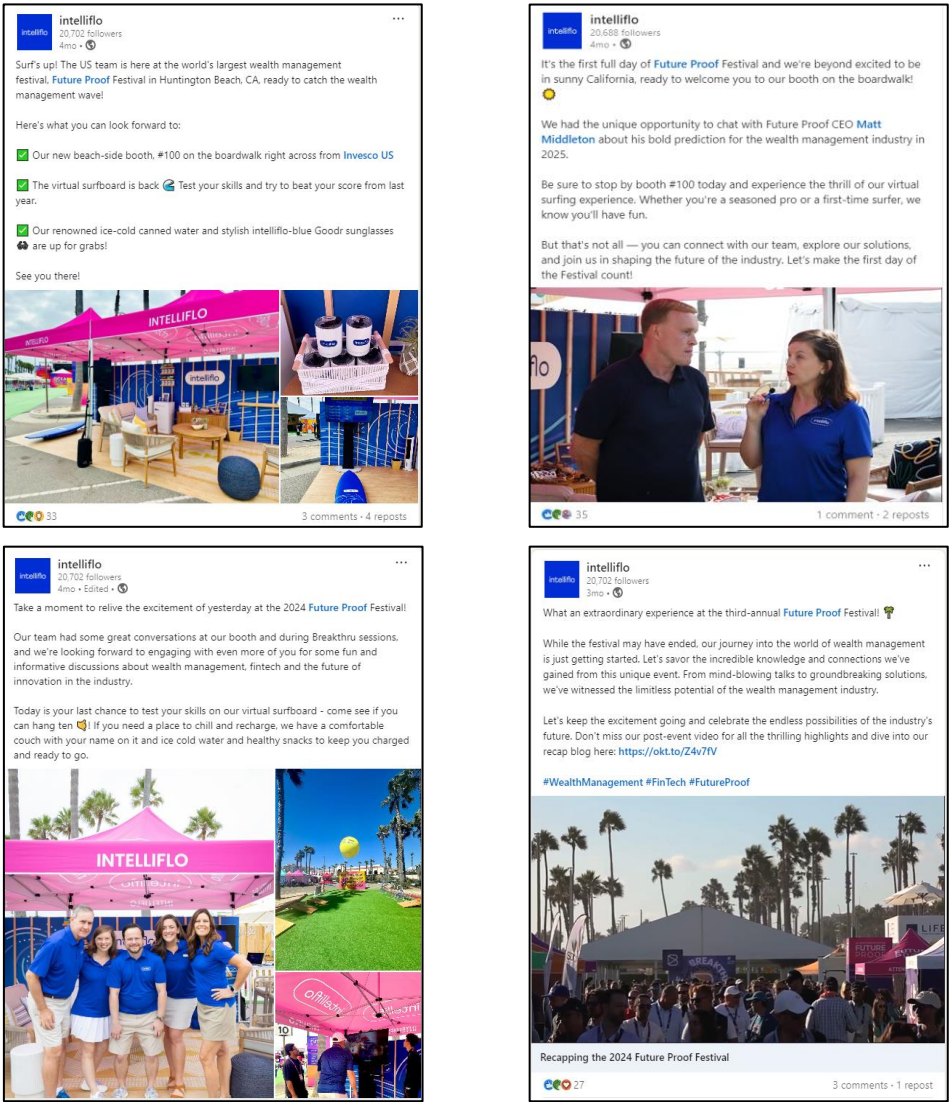
- Digital magazine ad example:



- Targeted email examples:

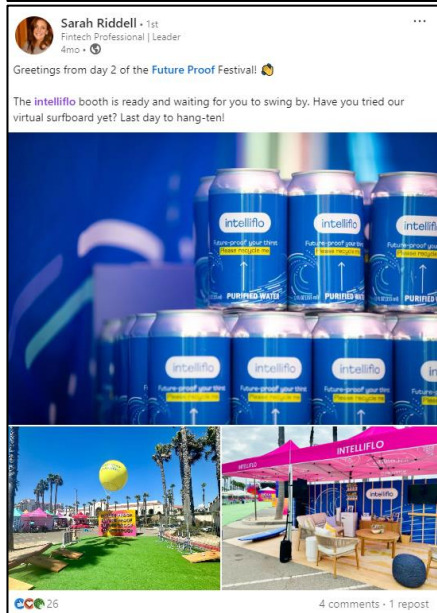
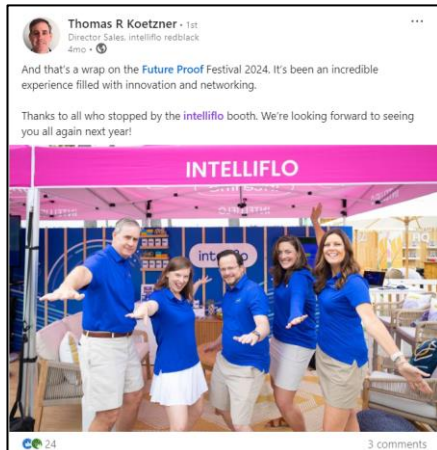


- intelliflo social media amplification examples:**
 - We launched 8 total strategically planned LinkedIn global posts before, during, and after the event

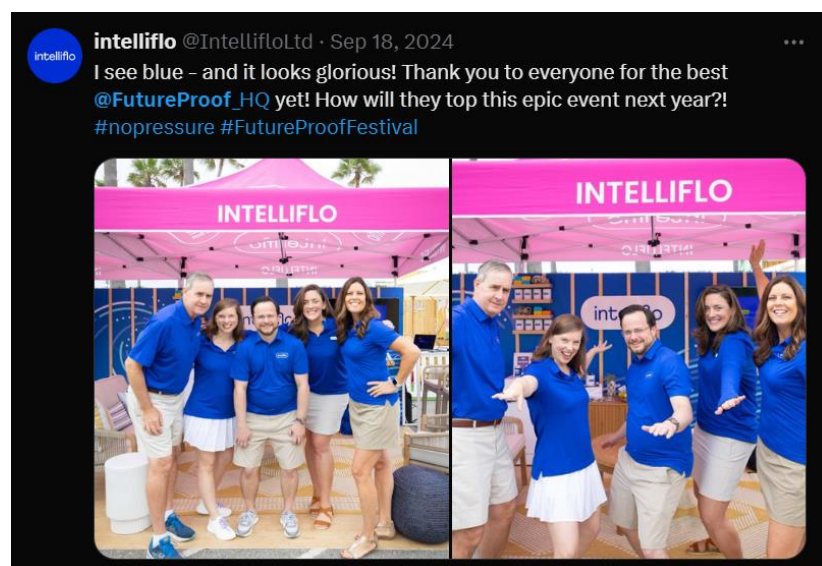
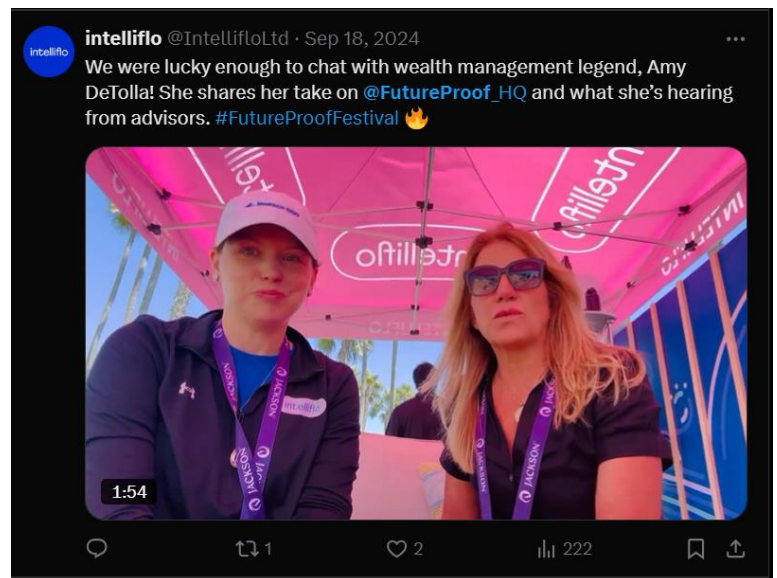
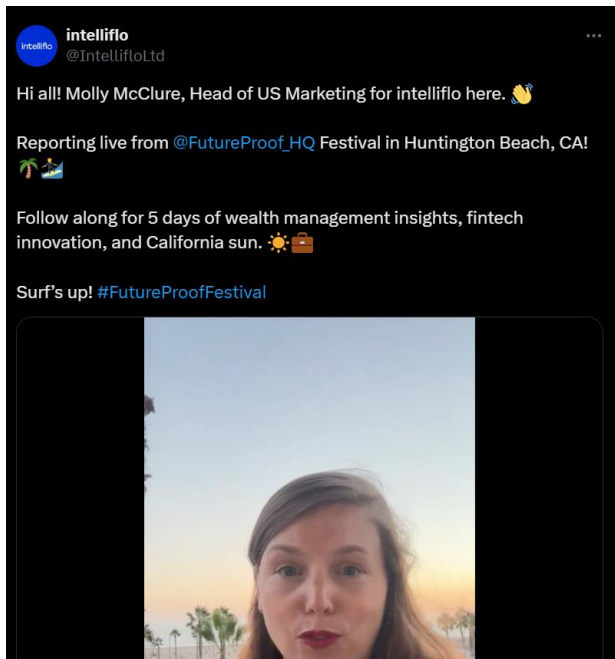


- **Employee social advocacy examples:**

- o We launched 6 total pre-scheduled posts to Oktopost, our social sharing software, for intelliflo attendees and other employees, to easily schedule and add to their LinkedIn accounts before, during, and after the event



- **Head of US Marketing X takeover of intelliflo's global account examples:**
 - First time testing a regional marketing executive taking over the global intelliflo X account to post real-time during an event
 - She launched 36 posts on X throughout the four-day event
 - We achieved 10x growth in average account impressions, driven by videos, interviews, and a more human-level engagement



- Media examples:

- o [Future Proof Insights: Serving Women, Client Growth, and Data's Importance | Advisorpedia](#)
- o [intelliflo redblack platform rides the wave of RIA M&A activity - Investment News](#)
- o [StreetCredPR video](#)

