



## Case Study

# Creating Effective B2B Marketing Strategies for Financial Services Companies

### CLIENT

Leading Trading  
Software Provider

### YEAR

2020

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## Inbound Marketing

The inbound methodology is at the heart of our approach and our inbound marketing solutions and strategies are data-driven and tailored to your business needs. We deliver targeted campaigns, relevant to your key personas, at each stage of the buyer's journey.

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# Changing perceptions by nailing it



# Our Awards

2016



2017



2018



2019



2020



HubSpot Marketing  
Enterprise Solutions  
2020 Partner  
Winner



2021



2022



Became Elite  
HubSpot Partner

Inbound FinTech has won numerous awards for **exceptional client work**, from HubSpot Impact Awards for integrations, marketing, sales and website design to UK and global agency awards, recognising growth and success in the **Financial Services** space.

## Overview

Our client was a global leader in trading software solutions and had been a [HubSpot](#) customer since 2015. However, they were not making full use of the features, due to lack of time and a big focus on physical events.

When Inbound FinTech first engaged with them, we were tasked with improving their digital marketing KPIs, complying with GDPR, generating quality leads and maximising the potential of HubSpot's platform and tools.

We worked with the client for several years to support their digital growth. This case study focuses on campaigns from 2020. In 2021, the company was acquired.





5/5



The overall impact of the agency's marketing strategy and support has helped us to significantly grow and develop the brand online, whilst the content they've produced together with our teams has positioned us as a thought-leader in the industry. In addition, they have really helped us to leverage HubSpot's powerful and intuitive tools, allowing us to use the software to its full potential.



**Global Head of Marketing at the client**

## Marketing and lead generation challenges

The main challenge that the client faced was with brand awareness on specific channels and lead generation.

Inbound FinTech was also brought onboard to ensure that the brand was recognised in the marketplace. Specifically, this meant making sure that the client ranked near or at the top of page 1 in online search results for specific terms (organic and paid).

### Search engine optimisation (SEO)

SEO had not previously been a focus for them, but the team recognised that optimising their website for search engines is crucial for long-term online success and to compete with more established competitors. So, we set to work on improving organic rankings to boost the visibility of their core pages and outrank competitors in the process.



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our SEO services



### Search Engine Optimisation

Ensure your website drives  
organic traffic and quality leads

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## B2B online lead generation

In terms of lead generation, our client's team were doing an amazing job at event marketing but their online lead generation was lacking. They were generating leads online but they were sparse and there was no dedicated plan in place for digital lead generation. The initial target was to generate 30 leads per month online from our marketing strategy and campaigns.

## HubSpot optimisation

Previously, HubSpot had been mostly used to send marketing emails and for creating landing pages when needed. Our role here, as an experienced HubSpot agency, was to review and audit their use of the platform and its marketing and sales tools, suggesting and implementing changes to make the most of the features.



# Inbound FinTech's marketing solutions

Initially, we conducted an audit into the company's online marketing channels against its business and marketing objectives, and its competitors.

We established their **brand positioning**, the improvements required and the best approach to meet their goals.

To lay the foundations for an effective B2B marketing strategy and lead generation approach, we started defining their buyer personas.

Inbound FinTech developed three main personas:

- Head of Technology Tony
- Head of Execution Eric
- Head of Trading Terry

The personas could be identified by their job title and the company they worked for. Therefore, it was important to record this information so we could effectively track, nurture and convert leads.

It was vital for the Sales team to have as much information as possible about the contact, so they could **tailor their content**, campaigns and outreach for maximum success.

Persona #3, Head of Trading Terry, was agreed to be the initial target persona, representing **the most valuable leads** for the business and the campaigns we wanted to create, including promoting our client's cutting-edge market data solution.

Do you want  
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Generation services



## Lead Generation

Supercharge your lead pipeline  
with data-driven digital strategies

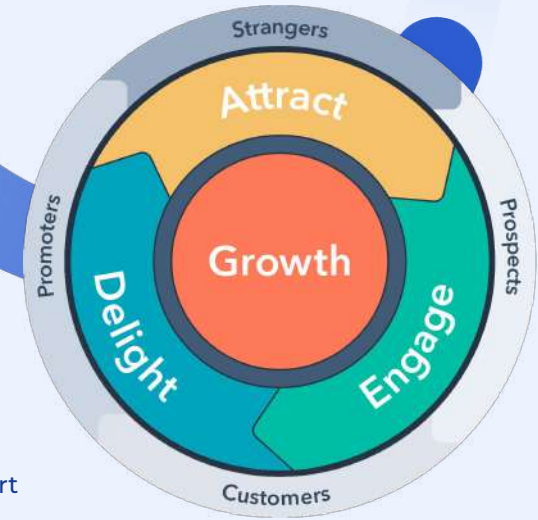
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When looking to HubSpot and the platform's tools and methodology for digital lead generation, we implemented inbound marketing best practices and created a campaign roadmap to deliver inbound campaigns, supported by paid activity to amplify the content and to target the persona on key channels.

Taking HubSpot's 'flywheel' model into account, all campaigns were developed with the ideal customer in mind to create the right marketing content and messaging throughout the buyer's journey. Inbound FinTech developed a multi-channel marketing campaign for the market data solution. Here are the key elements and channels used:

- **Inbound marketing content creation** - alongside other pieces of content, we created a compelling case study as a content offer to attract the key persona.
- **SEO** - we conducted keyword research, implemented onpage technical updates, optimised the product pages and case study page, and created a backlinking plan. As part of our SEO strategy, we have also developed the first pillar page for the client, which was a success both in matters of ranking in SERPs, backlinks and leads generated.



- **Paid search** - we created new ad group in the client's Google Ads account, leveraging the content that was part of the campaign.
- **LinkedIn Ads** - we used LinkedIn Ads to engage and generate hyper-targeted, high-quality leads.
- **Email marketing** - we automated triggers, task generation and internal emails to the Sales teams.

All activities across different channels were tracked through HubSpot, and specific dashboards and custom reports were created to show progress, milestones and goals reached by using the Reporting add-on.

# Results of our marketing strategy, campaigns and optimisation

## LinkedIn Ads

This social campaign, which was tested and optimised, generated 397 leads alone (at the time of writing), with an average cost per lead (CPL) of \$26.85, which delivered 320 highly-targeted, quality MQLs for the Sales team. The paid social campaigns all fed into HubSpot and the leads were enrolled into dedicated nurturing workflows, all within HubSpot's Marketing Hub.

## Lead Nurturing

These leads were nurtured with marketing emails, containing:

- Content tailored to the persona's interests, qualification criteria and buyer's journey stage, etc
- Blogs, industry reports, press releases and relevant articles

Ongoing, the leads that are not ready to move forward yet, can be nurtured through regular marketing emails, leveraging and repurposing blog posts, articles, industry reports, press releases, and smart content on the website.

Other KPIs include email metrics for the client's nurturing workflows. The workflow emails that we created and set up for the client delivered very strong results - see the stats for one of the campaign workflows:

OPEN RATE ⓘ

71.31%

676 OPENED

▲ 452%

CLICK RATE ⓘ

10.65%

101 CLICKED

▲ 764.77%

CLICK-THROUGH RATE ⓘ

14.94%

1

▲ 56.63%

## Sales Enablement

The Inbound FinTech team worked closely with our client’s team to devise and implement an effective sales follow-up workflow process for their internal Sales team.

A series of automated workflows was set up, which sent follow up emails, internal emails, created tasks and assigned contact owners, based on specific criteria. This enables Sales to quickly work on newly-generated leads from the campaigns.

## SEO

The campaign not only drove the conversions mentioned but influenced existing contacts in the database as well. And for the ‘market data feed’ keyword, the client ranked in position 1 in organic rankings (at time of writing).

The graphic on shows a three-month snapshot of search position rankings and the growth we achieved for the client during the campaign.



Our SEO ranking focus for the client delivered strong results for the following:

- **Market data keywords**
- **The brand**
- **Direct market access keywords**

For a B2B lead campaign in a specific area of the Financial Services sector, and without a huge budget factored in to play with, these were extremely pleasing results.

As demonstrated on the previous page, the search rankings for these keywords improved during the quarter and continued to rise, due to the optimisation done on the website, specific pages and thanks to the pillar page created, which grew over time.

The client also outranked its competitors on Google Ads to achieve an average position of 1.9 and over 50% of the total impressions for their target keywords on Google Ads (at the time of writing).

From both organic and paid activity, using the landing page, pop-up forms and LinkedIn Ads, the campaign generated a total of 519 new contacts (at the time of writing).

## Overall marketing impact created for the client

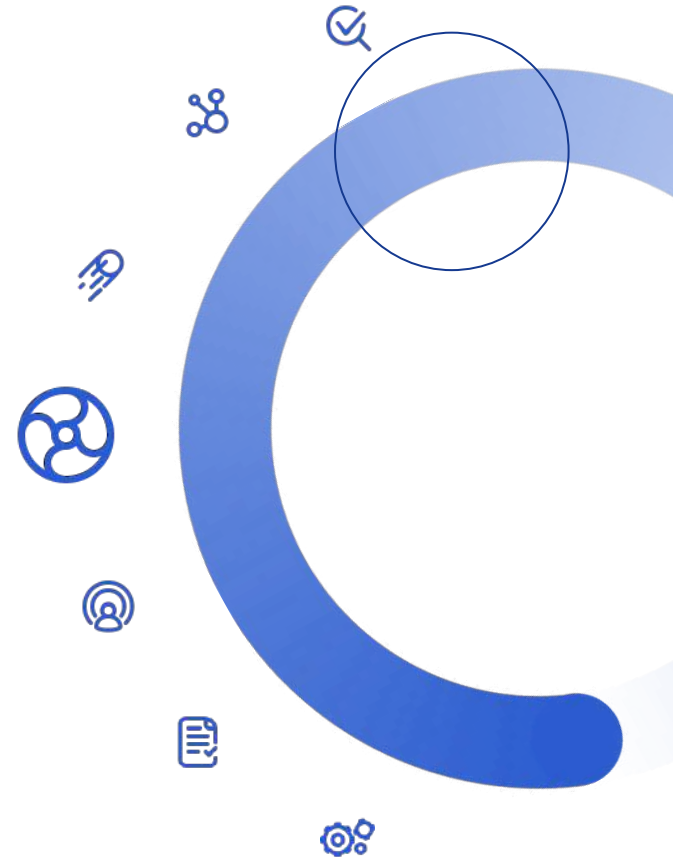
The client was very happy with its positions in organic and paid search rankings. They were also delighted that their website and target keywords outranked competitors in both paid and organic search results.

The original target of **30 leads per month** was exceeded every month and we continued to deliver marketing campaign success for the client within the set budget.

They made great use of HubSpot's range of features and moved their entire Sales team on the platform by purchasing over 20 [Sales Hub Enterprise](#) seats.

They used the **reporting feature** for the entire business, whilst our multi-channel marketing approach really drove up **brand awareness**.

Crucially, the client enjoyed a **regular flow of high-quality leads** from digital marketing activities and the Sales team has a **slick follow-up process** in place, thanks to the **automated workflows** we implemented.



## Summary

We were really pleased to create such a big impact for our client with HubSpot and our targeted marketing strategies, lead generation campaigns, sales enablement work and SEO improvements.

The company was delighted with the success of our relationship and campaigns, and enjoyed continued growth before being acquired in 2021.

If your marketing or sales processes need of a revamp and you'd like to learn more about HubSpot's powerful suite of growth tools, [get in touch with Inbound FinTech](#) today.

As an [elite-tiered HubSpot agency](#), we know the platform inside out and we have the knowledge and expertise to help you leverage the tools effectively, to drive more leads, opportunities and deals for your business.



## How we do things at IFT

In a climate where many agencies try to be and do everything for everyone, we've refined our service offering within the Finance sector.

In just a few years, we've become an award-winning digital growth agency with a global client base, working predominantly with Financial Services brands and FinTech companies. We know what works and we execute it for our clients every time with our team of SEO, PPC, Inbound, Outbound, Account Management and Content Marketing specialists.

Our collection of digital skills, marketing expertise and collaborative approach has earned us awards, recognition and growth and helped us to drive success for our clients. We recently became a elite HubSpot solutions partner and we're also Google, Bing and Shopify partners. Our mission is to become the leading growth agency in the UK for the Financial Services industry.





Discuss your **Inbound Marketing** project with an elite Hubspot partner




Sheila Mitham

 CEO



Maria Milea

 Partner and  
Managing Director



Book a call  
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