



Cetera Financial Group provides award-winning wealth management and advisory platforms, comprehensive broker-dealer and registered investment adviser services, and innovative technology for more than 9,700 independent financial professionals and more than 500 financial institutions nationwide.

In its industry of financial services, it is notoriously difficult to innovate in the marketing side of business. But Cetera makes great strides to break that stereotype and employ new marketing technologies to fuel growth.

“We’re always looking for new ways to increase our exposure with financial professionals, but we didn’t want to stop there,” explained Eric Hansen, director of recruiting marketing at Cetera Financial. “We wanted new and innovative ways to reach more of our target audience and drive engagement beyond email alone—to consistently personalize communication with them after they’d visited our website or given us their email information.”

Attracting New Audiences to the Website at Scale

LinkedIn Network Display enabled Cetera to reach hundreds of thousands of finance professionals with display ads everywhere online. The use of LinkedIn’s anonymous business demographic data ensured that ads were only seen by its most coveted audience—professionals in finance who worked at “micro” sized companies (less than 20 employees). “[The] impact on our visibility in the marketplace has been substantial,” Hansen shared. “It has helped give our prospects a better perspective on who we are. We have people coming to us saying ‘I feel like I have to talk to you guys because I see Cetera everywhere online.’”



“[The] impact on our visibility in the marketplace has been substantial. It has helped give our prospects a better perspective on who we are.”



Eric Hansen
Director of Recruiting Marketing
Cetera Financial Group

Objectives

- Drive the right audiences to its website
- Increase visits and engagement
- Drive new business

Target Audience

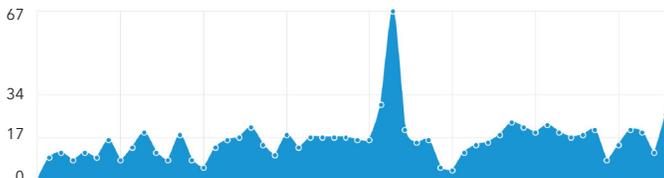
- Financial professionals
- Financial institutions

Results

- Over 900 new website visitors driven by LinkedIn
- 27% more pageviews
- Over 13% more visits per visitor on the website
- Nearly \$1 million in new business

LinkedIn's Full-Funnel Analytics gave Cetera insight into the impact of its targeted display advertising efforts with metrics including net new visitors driven to its website, engagement levels, clicks, conversions, and more. In just three months, LinkedIn drove more than 900 new visitors in finance to the Cetera website.

Daily New LinkedIn-Driven Visitors



The New Visitors Report reveals LinkedIn's impact on driving new target audiences to Cetera's website.

Nurturing Known Contacts Beyond Email

Cetera uses Oracle Eloqua's marketing automation system to nurture it's known contacts via email—enabling segmentation and automation of email delivery to prospects and customers for whom Cetera has an email address.

But email has its limitations. And even for prospects who did open their emails, Cetera wanted to do more to educate them about the company.

LinkedIn Lead Accelerator allowed Cetera to add display and social advertising to its existing email nurture campaigns, directly from within the Eloqua Campaign Canvas. As known contacts received emails week after week, synchronized display and social ads were also delivered to them everywhere online.

Hansen can attest to the positive impact display and social ads have had on his nurturing results. "We had a financial advisor complete a webinar registration over a year ago, and he began receiving our emails. One email sent 4 months ago made him click, but his subsequent web actions didn't trigger any adjustment in his lead score. About a month after we'd implemented [LinkedIn Lead Accelerator], he received a Facebook ad from LinkedIn, clicked, indicated interest, and later closed."

"We can reach prospects anywhere online and make every interaction with them more personal and relevant throughout the buyer's journey."



Eric Hansen
Director of Recruiting Marketing
Cetera Financial Group

Nurturing Anonymous Website Visitors

Cetera also used LinkedIn Lead Accelerator to nurture its anonymous website visitors—those who hadn't yet submitted their email address to Cetera via a form completion. Prospects who'd previously visited the website were placed into anonymous nurture campaigns that delivered waves of different display and social ads, giving them a chance to engage with the most relevant content. As prospects spent more time on the Cetera website and indicated specific interests, that data was used to deliver ads that were personalized to their unique interests.

LinkedIn's analytics showed that visitors, both anonymous and known, who had been nurtured by LinkedIn viewed more web pages and visited the site more often than visitors who hadn't been nurtured.

Visitors Who Viewed LinkedIn Display and Social Ads Had:

27%

More pageviews/visit

13%

More visits/visitor

It All Comes Down to Driving New Business

Cetera used LinkedIn to add value in two critical areas: increasing brand awareness by driving financial professionals to the Cetera website at scale, and seamlessly connecting display and social advertising to its marketing automation platform to not only communicate with known and anonymous audiences beyond email, but also to make the buyer's journey more personal. And of course, measuring the impact at each stage along the path to revenue.

Hansen's return-on-investment analysis revealed that LinkedIn has driven more than \$960,000 in new business to Cetera to date. "The results we're seeing right now are a product of adding display and social advertising into our overall nurturing strategy—we can reach prospects anywhere online and make every interaction with them more personal and relevant throughout the buyer's journey."