intention.ly

Rebuilding Vanilla's Marketing Organization and Growth Engine

KEY RESULTS:

Organization Realignment
Critical roles filled and structure redesigned for the next stage of growth

Record lead flow
Highest lead generation levels the company had reached to that point

Clean data, clear ROI
Marketing data and reporting rebuilt to connect activity to business outcomes

6 months
From outsourced CMO engagement to a new fully onboarded permanent CMO

Vanilla

Vanilla is an estate planning technology platform built to help financial advisors and wealth management firms deliver modern, scalable estate planning experiences to their clients. When Vanilla's marketing leader left at a key growth stage, the company brought in Intention.ly to rebuild the function.

THE PROBLEM WITH A PLACEHOLDER

Vanilla was looking for an **experienced marketing executive** who could step into the business immediately, lead the existing team, and rebuild the marketing organization and growth engine alongside the search for a permanent CMO.

Vanilla brought in **Intention.ly Founder and CEO Kelly Waltrich** as outsourced CMO to rebuild the team and the growth engine, clean up the data and infrastructure, and kickstart lead generation, all work that had to be designed to hand off to the new marketing leader.

REBUILDING THE TEAM

Kelly worked closely with Vanilla's existing marketing team to strengthen their confidence, clarify individual roles, and establish meaningful goals. Rather than simply identifying staffing gaps, she focused on empowering the talented people already in place, providing the direction, support, and resources they needed to succeed.



Revving the lead generation engine

With the team in place, Kelly and Vanilla's internal staff looked at how prospects entered the funnel, how programs were performing, and how leads were captured and managed. The new approach, disciplined and coordinated, drove lead flow to the highest levels Vanilla had reached at that point in its growth.

Fixing the data behind the decisions

Kelly helped Vanilla's marketing team make better use of its existing data, translating marketing performance into clear, actionable insights for leadership. This gave the executive team, particularly the CEO, greater visibility into where to increase investment, where to pull back, and where gaps in the marketing-to-sales handoff could be addressed to improve results.

Handing off a stronger function

Through the CMO search, Kelly worked closely with Vanilla's recruiter, helping define what the role needed and supporting the evaluation process. Once Vanilla picked its new CMO, Kelly onboarded the incoming executive. She walked through the rebuilt growth engine and reporting infrastructure and passed along the institutional knowledge needed for a smooth transition.

An ongoing partnership

As Vanilla continues to grow and expand its enterprise presence, Intention.ly supports its marketing efforts through AI search optimization (AEO) and advertising on Facebook, Reddit, and in industry trade publications. Kelly also provides ongoing executive-level consulting to Vanilla's CEO and CMO, helping shape marketing strategy, prioritize opportunities, and support the company's evolving growth goals.



THE RESULTS

In six months, Intention.ly strengthened Vanilla's marketing team, rebuilt its demand generation engine, and fixed its data and reporting infrastructure, with leads hitting record levels along the way. Vanilla's new CMO took over a stronger marketing organization than the one Intention.ly stepped in to run.

Get in touch to learn more.

Let's talk about what we can work together to achieve. **Contact Kelly Waltrich at kelly@growintentionally.com,** visit **www.intention.ly**, or scan the QR code.