

Strategic Digital Marketing for a \$10B+ Advisory Firm: Driving 125 Qualified Leads and Exceeding Annual Goals

The Challenge:

SignatureFD came to Intention.ly after hitting a wall with their previous digital marketing agency. While they were technically meeting their goals, they knew they could do better. Their leadership team suspected there was significant waste in their ad spend, particularly in Google campaigns that showed high volume but questionable ROI. Without proper attribution reporting, they couldn't pinpoint which channels were actually driving qualified leads versus just generating clicks. **They needed an agency partner who could not only improve performance year-over-year but also provide the transparency and data-driven insights to make smarter marketing decisions.**

The Solution:

Multi-Channel Digital Strategy

We launched a comprehensive digital marketing approach spanning Facebook, LinkedIn, Google Performance Max, branded and non-branded paid search, plus Google Display and YouTube advertising, allowing us to test different audiences, messaging, and creative approaches across multiple touchpoints.

Custom Attribution and Reporting

One of our biggest wins was creating a custom dashboard that integrated SignatureFD's Salesforce data with HubSpot, giving them clear visibility into which channels were driving actual qualified leads rather than just traffic or clicks.

Content Marketing and SEO

We maintained a consistent blog publishing schedule focused on driving organic search traffic and establishing thought leadership in their industry.

Phased Optimization Approach

We structured the campaign in phases, starting with Q1 testing and learning while optimizing the previous agency's existing assets. In March, we launched new campaigns with proper budget allocation, which immediately showed significant improvements in lead volume and quality.

Strategic Budget Management

Rather than spreading budget thin across ineffective channels, we strategically allocated spend to enable thorough testing while maintaining the flexibility to double down on what worked.

The Result:

✓ **1,011 leads** generated through paid social, paid search, and organic search

✓ **128 qualified leads** generated by intention.ly (52.5% of SignatureFD's total qualified leads)

✓ **21% average qualified lead flow YTD** generated through paid social, paid search, and organic search

✓ **50 MQLs generated** in Q1 alone after campaign optimizations

✓ **Organic website sessions up 13%** (+7.5% engaged sessions) period over period

✓ **Enhanced attribution visibility** through custom reporting dashboard

Measured January - July 2025

Intention.ly Services Used:

Digital Marketing

Custom Analytics

Content Marketing

SEO

Design