

Case Study



Helping AdvisorStream land and expand in the UK through a joint sales & marketing approach.

The Challenge

Based in Canada, AdvisorStream provide an automated digital marketing platform for financial advisors. As an industry-leading supplier, since 2012 they've offered a stream of fully licensed content for FAs via more than 40 of the world's top financial publications. With market domination in North America, AdvisorStream turned their thoughts to scaling up their business overseas, specifically in the UK. With little knowledge of the nuances of the UK financial market, they engaged durhamlane as demand generation experts. Our task: to align sales and marketing activities and penetrate the UK market.

Our Solution

Initially we created strategic lead generation campaigns, focusing on the IFA and Enterprise markets. Our aim was to maximise both marketing and sales qualified leads through marketing activity and the creation of engaging content. We used dedicated analytics tools to identify the right data-led tactics, driving campaign success and optimising investment.



The outcome for Advisorstream:

73 

Days worked on project

41 

Qualified Opportunities



Creation of Strong Pipeline

4-5 

Days per week resource level

63%

of opportunities generated are MQLs



Landing & expanding into the UK market

Targeted Markets:



Independent Financial Advisors



Enterprise



“Not only was the durhamlane team instrumental in generating a steady flow of leads for our sales team to close, but they also educated us on the many nuances of the market that would have been far more difficult to learn on our own. Professional through and through, durhamlane is a must-have partner for anyone wanting to accelerate the growth of their business.”

– Karim, Managing Director