

SUMMIT CREW DIGITAL AGENCY

CASE STUDY

FINANCIAL MANAGEMENT COMPANY

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SummitCrew.com



Understanding the Client

ABOUT BERKSHIRE MONEY MANAGEMENT

Berkshire Money Management is an independent investment advisory firm based in the Berkshires--Pittsfield, Lenox, Dalton, Lee--of Western Massachusetts.

THE SITUATION

Berkshire Money Management came to Summit Crew looking for assistance in strategy development that would generate a larger number of high-quality leads.

Summit Crew was able to identify targets by understanding their online and offline behavior which included their interests, backgrounds, history, demographics, and location.

THE CHALLENGE

One of their biggest challenges was that they were in a very competitive marketplace. They were not getting a strong enough return on investment in their campaigns. The problem was that their campaigns lacked strategy, unique messaging, and organization.

THE SOLUTION

Summit Crew optimized a digital advertising campaign focused on gaining website traffic, furthering brand reach then identifying and moving new audiences through to become a lead. Using a creative video campaign with strategic geographic and demographic targeting in order to establish market dominance.



**ACTION
STEPS**

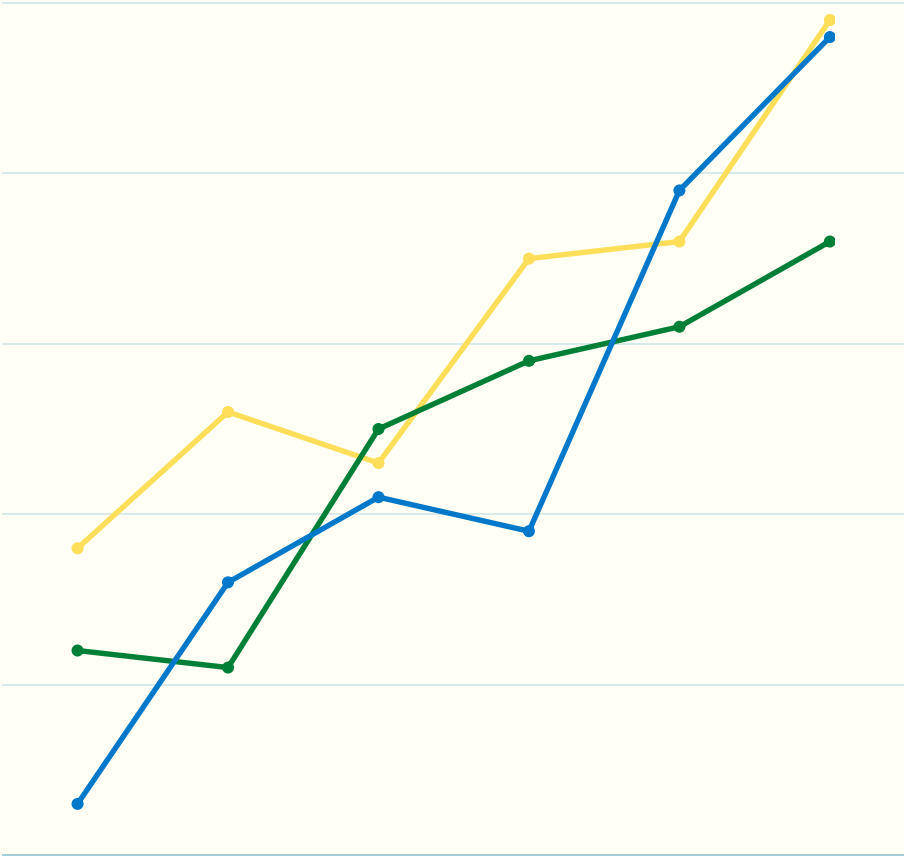
551%

INCREASE IN NEW VISITORS

100%

INCREASE IN QUALITY LEAD CONVERSIONS

The Results



NUMBERS ON THE RISE

Summit Crew was able to successfully generate a 551% increase in new website visitors and that generated a 100% increase in inquiries from qualified prospective leads year over year.