

C A S E



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John Suarez, MBA,

President and Founder,
Peristyle Private Wealth

How **Peristyle Wealth**

Used Snappy Kraken’s Automated Growth Program

TO CULTIVATE A \$150,000+ PER YEAR RELATIONSHIP



\$150,000+

recurring revenue generated
via one client



100+

hours saved on content
creation and automation



Peristyle Private Wealth is an independent financial consulting firm offering concierge-style planning and investment management services for selective investors.

HIGHLIGHTS

Challenges

Time needed for client acquisition over content creation

The ability to customize business messages to clients

Compliant automation and timely emails

Challenges

Timely, compliant messaging without hours of oversight, content creation, or maintenance

John Suarez, MBA, started Peristyle Private Wealth in 2019. As the President and Founder of a solo, independent financial practice, John's main concern was nurturing his young business. While his messaging was important to him, he needed to focus his attention on client acquisition and ongoing due diligence in managing his clients' money.

With a very specific, very niche audience of founders, funders, and entrepreneurs, John wanted complete control over the communications sent out by Peristyle Wealth.

As John's time was in such high demand, being able to send emails that conformed to compliance standards without constant oversight was vital.

"I wanted to take more control over my messaging. I am absolutely a control freak when it comes to that, but I also needed a way to send messaging out that wouldn't be overstepping compliance boundaries," he explains.

He found that with his niche client base, the outreach program he was using wasn't working for him. The leads he was getting back did not fit his customer profile—he needed a fix. Fully aware of his time limitations, John was looking for a partner to handle the automated messaging and compliance portion of his business, while maintaining efficiency.

"Because I was spending my time with client acquisition and managing money, I really needed a partner for messaging and the regulatory concerns of compliance. The idea of having some automation in place with a partner that has actually done this, studies it, and knows the field really well is what I needed." John explains.

Also, because John didn't have a technical background to package messaging and get it out efficiently, hiring someone in-house to complete these tasks would be too expensive.

"Why hire someone in-house to reinvent the wheel that was already created by Snappy Kraken," he says.

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Solution

A fully automated, customizable system in 90 minutes a week

John uses Snappy Kraken for professional and personal communications with great success.

For Peristyle Wealth, Snappy Kraken saves John time by providing content frameworks with options to choose from. Using Snappy Kraken's automated, timely emails, John runs campaigns every few weeks using their content in concert with his own.

"I find that it's more than enough for me to continually be on the top of people's minds without me having to create 600 unique emails," he explains.

Relevant, readily available content like market updates, behavioral finance pieces, and soft check-ins, John can choose what he wants to send out to his narrow focus market. He is in complete control of his messaging.

"I can completely customize an email without deleting everything and reworking it. That is great when you want to create your own content for timely emails," he remarks.

In as little as 90 minutes a week, John reviews and creates content provided by Snappy Kraken.

"That time per week then allows things to be automated for the next three to four weeks," he states.

John also knows that under the umbrella of Snappy Kraken, he doesn't have to worry about compliance issues.

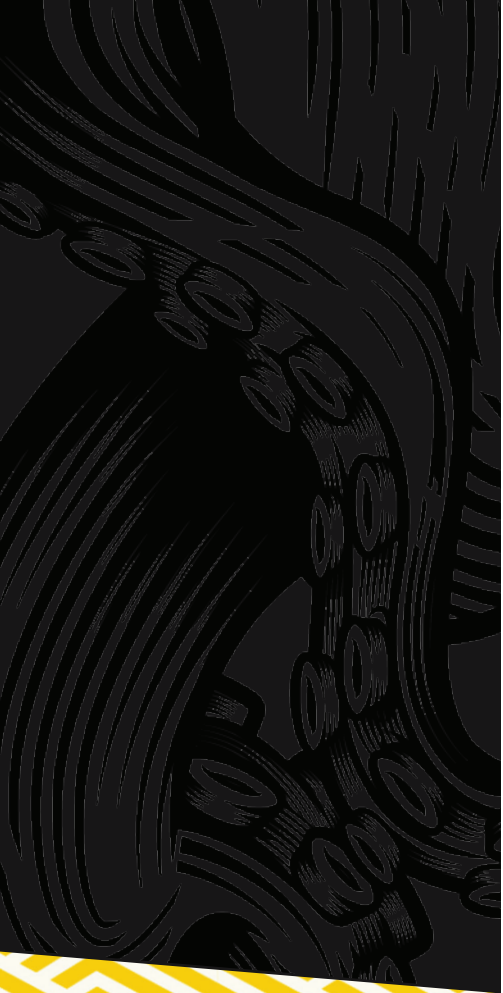
"Snappy Kraken is hyper-aware of regulatory concerns of compliance. That is a huge separator. That aspect alone has a lot of value. They don't do anything without me pressing a button and allowing it. It was pretty easy to just dive in," he says.

On the personal side of things, John is part of an online car enthusiast community. Over the last 20 years of being involved in this community, John has created an online persona. Periodically, he sends out a mix of market-related and personal advice and news. More recently, John sponsored the community's website in return for a banner advertising Peristyle Private Wealth.

HIGHLIGHTS

Solution

- Readily available content frameworks with customizable content to choose from
- Time-saving automation of content
- Content relevant to a niche market



John encouraged people to sign up for a newsletter once they clicked on the banner ad taking them to his own website.. Using Snappy Kraken's platform to add in a list of contacts he already had—and also send out the newsletter—John could create automated touch points in a community he was passionate about.

Through this clever marketing, John received an email from one of these community members who wanted to arrange a call to enquire about help with financial planning.

One 20-minute call later, John got some incredible results.

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Results

A nurtured relationship that results in \$150,000+ in revenue per year

That same evening, John's new client opened up a joint account for himself and his wife, as well as an IRA. Within a week, the client had transferred over \$7 million that was fully billable on a fee-based schedule. The client subsequently brought over an additional \$10 million 3-weeks later when a liquidity event occurred.

To quantify that, John explains, "This one relationship is approximately \$150,000 of recurring revenue to me for every year that I keep this relationship."

And this is only one of six or seven clients John has obtained from his pool of car enthusiasts using Snappy Kraken.

John has an automated, compliant, and fully customizable system he can use to grow his business.

"Snappy Kraken does a great job of getting people's attention—they got my attention. There's constant content coming from the team at Snappy Kraken. It's a very thoughtful organization. Being able to save my time and be where people in my niche are present, just means that when the timing is right, I'm probably the first person that they think of," John says.

Referring to time saved on content creation and automation, John says, "If I were creating all of that on my own, it's hundreds of hours."

With an overwhelming amount of revenue streaming in, Peristyle Wealth doesn't feel the need to use paid ads on Snappy Kraken. However, in the future—when he has the capacity—John plans to use Snappy Kraken's full potential.

"With all of the recent acquisition, which Snappy Kraken has contributed to, I'll soon be able to expand by taking on new partners and employees to kick growth to an even greater level," John explained.

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HIGHLIGHTS

Results

- 100+ hours saved on content creation and automation
- \$150,000+ of revenue generated per year through one relationship
- Compliant emails and systems for peace of mind

AN AUTOMATED GROWTH PROGRAM FOR FINANCIAL ADVISERS WHO CARE ABOUT MEANINGFUL CONNECTIONS.

*Original Content + Easy Automation
+ Proven System*

WATCH A DEMO

