

Case Study Sample Pack



A Group Vested Company



The Art of the Case Study

"No argument in the world can ever compare with one dramatic demonstration."—David Ogilvy

Show, don't tell

Whether it's in person or in print, nobody wants to hear you talk endlessly about how great your product or service is, as if the number of words you use to describe it makes any difference.

But case studies can help you sell on another level because they demonstrate to prospects how you helped an actual customer resolve a real problem.

And when it's a problem similar to your prospect's problem, a well-written case study does all the selling for you.

Case study composition

Case studies follow a basic 3-point formula:

1. **The brief** describes the problem your customer faced
2. **The approach** highlights how you tackled that problem
3. **The result** shows what the client achieved due to your efforts.

Good to great

What separates a great case study from the rest?

It's relatable: Your case study should address pain points that directly speak to your customers' needs and wants.

It's complete: Your case study should answer all the relevant 5W+1H questions: Who, What, When, Where, Why, and How.

It's well written: A story, effective headlines, short sentences, eye-catching images, and even brief videos can make a big difference.

Hit these points and you're well on your way to a case study that is a highly effective sales tool.

For example...

In the pages that follow you will find some great examples from Group Vested companies including Finance Studio, Accelerator, and Red Lab Technologies.

CASE STUDY: CLARITY MONEY

Demonstrating Financial Advocacy

THE BRIEF

Clarity Money engaged our agency when it was in pre-launch phase with budgetary restrictions for the campaign. Clarity is a new personal finance app, launched by Adam Dell, that utilizes AI and machine learning to act as a champion for consumers' finances. In a relatively crowded PFM space, our work was to launch the app in January 2017 and hit over 4,000 downloads.

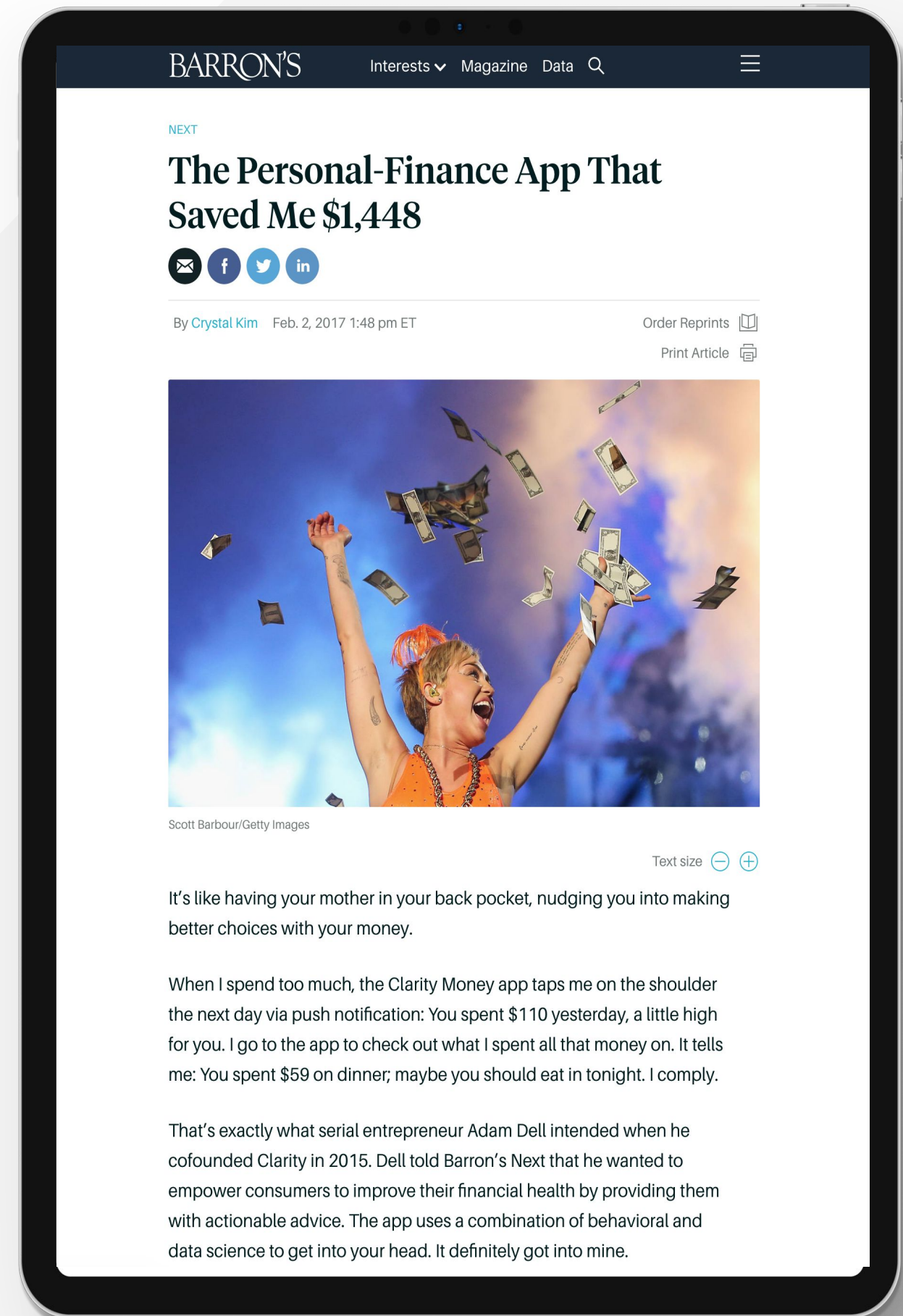
THE APPROACH

A multi-track approach targeting numerous audiences (existing PFM users, young 11, fintech/VC press) to achieve downloads and help tee up the next round of funding.

THE RESULT

Clarity Money smashed all targets, hitting over 1 million downloads. The firm had an oversubscribed funding round and has achieved 100% positive press, with advocacy from media, bloggers and influencers. Clarity Money was acquired by Goldman Sachs in April 2018. Post-acquisition Clarity Money successfully completed a paid content partnership with Bustle in an effort to drive users to download the app.

FEATURED ON:    





CASE STUDY: Marcus

Giving a human voice to a banking authority

THE BRIEF

Long the authority in investment banking, Goldman Sachs (GS) branched out to retail banking with its Marcus high-yield savings products. To appeal to a new, unfamiliar retail savings audience, the bank needed relatable, original content unique from its traditional and institutional, yet wide-ranging research.

THE APPROACH

Many on “Main Street” already perceived GS as the authority on “Wall Street.” But few recognized a distinctly human presence behind the corporate brand. The goal was to use blog content to relate to and convince potential savers that Marcus was the best place to keep their savings. The blog’s voice would appeal to someone highly mobile, digitally savings-savvy, intellectual, and economically curious.

To achieve this goal, we worked with Marcus’ content marketing team to curate and write on topics from GS’ vast library of proprietary research. We leveraged GS’ economic reports; video briefings with prominent executives and subject-matter experts; and analyses on markets, industries, and trends. We also applied GS’ SEO findings to capture high-ranking opportunities among competitor content.

THE RESULT

We produced 2 weekly pieces of original short-form content around 500-750 words each, all with a conversational, friendly, and smart voice, similar to that of an amusing and educational advice and opinion column. In addition, we painstakingly researched all content to ensure accuracy and satisfy GS’ style and compliance rules.

Within 8 months, a Marcus user survey reported our work helped the brand achieve a 33% lift in “favorability” and 19% uptick in brand awareness.

5G Could Stop Sputtering Video Calls and Help the Economy Bounce Back



You've probably heard a lot about 5G technology lately.

There have even been rumors - which FYI, [this CNN article](#) says are "baseless" - that Covid-19 pandemic.

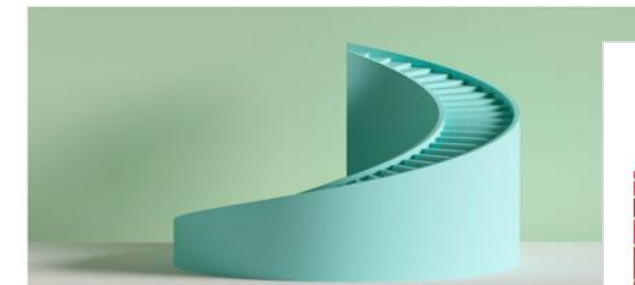
How Hard Is It to Get Accurate Employment Numbers?



Every month, the Bureau of Labor Statistics releases a summary of how many people in the US are working and how many aren't. You'd think that arriving at these numbers would be as simple as asking people to "Check 'Yes' if you receive a paycheck and 'No' if you don't."

It's not that straightforward, and the BLS recently had errors in the March, April reports because some people who were counted as employed should have

Why You Should Continue to Contribute to Your 401(k) If You Can



As we adjust to new routines these days, many of us are re-evaluating various aspects of daily life. As the economy continues to plod forward, financial concerns remain top of mind for almost everyone.

"Stay invested" is something you've probably heard over and over again in times of market volatility. But what does that mean when it comes to your 401(k)? One popular question

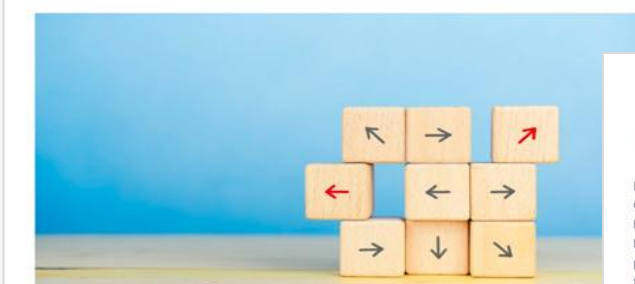
How the Pandemic Is Impacting the College Economy



This year, many college campuses were eerily quiet. The usual back-to-school fanfare and excitement weren't there because there was, well, a lot missing from the picture. Tailgates, Big Game parties, and in some cases, students. Not surprising given that a number of campuses decided to go remote for the Fall 2020 semester "remote-only" because of the pandemic.

As colleges are trying to make due, the truth is that campuses are struggling financially

How This Recession Is Different from the Last One



Are all recessions created equal? Sort of. When we're in a recession, economic activity slows down, businesses pull back and unemployment starts to climb. But look a little closer and you'll see that recessions and their recoveries aren't always the same.

There are some similarities to 2008's Great Recession, including retail taking a big hit and unemployment climbing higher. Back in the 2000s, peak unemployment hit 10 percent

Fighting Climate Change Could be Good for the Economy and the Planet

Even in a news cycle as rapid fire as 2020's, the headlines and media coverage around the California wildfires have been tough to miss, and even more difficult to ignore. While the fires have a number of causes - human missteps, a history of fire suppression, and natural events like lightning have all played a role - climate change is also considered a culprit. Shifting weather patterns have led to hotter and drier conditions across the West which are, well, adding fuel to the fire.

Tackling climate change will take enormous financial resources from both public and private-sector financing.

Reducing greenhouse gas emissions is one approach that could help curb climate change. While it's a monumental task in itself, adapting to a changing climate will also require huge investment, as discussed in the Goldman Sachs Research report [Taking the Heat](#).

First, some good news. Recent pandemic-related lockdowns made a dent in greenhouse gas emissions. From March to April 2020, CO2 emissions from petroleum and coal both plummeted 25% and 36%, respectively - and the changes in emissions resulted in record lows for those fuels. The reports of clearer skies showed that it's still possible to enact positive environmental change.



CASE STUDY: BEACON PLATFORM

Building Brand Awareness

The Brief

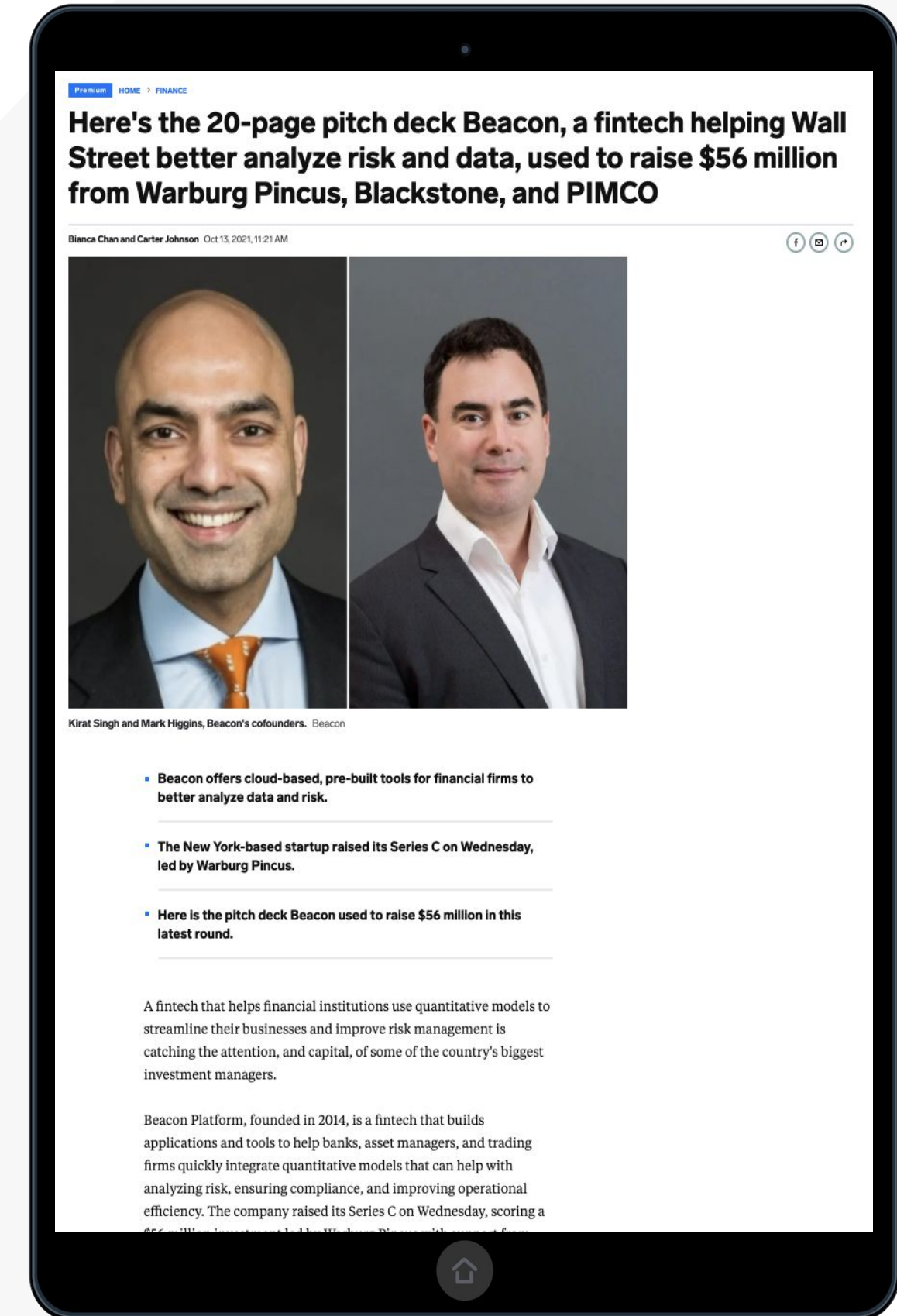
Beacon Platform moves financial markets into the future with secure and scalable quant technology, elastic cloud infrastructure, and front-office applications. Their platform and service is one that is complex and not easily distilled or summarized, yet has use cases within diverse industries. We were challenged with building brand awareness for Beacon and their platform.

The Approach

Our approach was to line up a diverse roster of spokespeople who could speak to various industry trends, company announcements and technology challenges/solutions. After media training six spokespeople, the next step was to get thought leadership commentary in front of the right audiences. We focused on expert commentary and op-ed placement for Beacon executives on ranging topics across developer culture, cybersecurity, ESG, risk and scalability. This was followed by industry relevant award submissions and leveraging the founders to speak to company announcements such as their Series C fund raise.

The Results

Not only did we support Beacon to achieve various industry awards for the company and its executives, we were able to secure a Series C exclusive with Business Insider, place Beacon executives in trade media publications, such as Risk.net and NASDAQ, with commentary that spoke to not only industry trends, but positioned Beacon as a thought leader. That year, their staffing headcount was up by more than 60%, their client base grew by more than 60 percent while increasing annual recurring revenue by more than 100 percent.



FEATURED ON: **BUSINESS INSIDER**





red lab

A Group Vested Platform



DIGITAL CASE STUDY: Odyssey

Fixing marketing funnels increases revenue

THE BRIEF

Odyssey Test Prep & Tutoring provides personalized, custom LSAT test preparation and tutoring services in New York City. Odyssey turned to us for help with top-of-funnel traffic, better quality lead generation and sales, and asked to double the previous year's revenue.

THE APPROACH

We implemented "top funnel" search marketing campaigns via Google and Bing, targeting searches related to LSAT self-study resources. We unleashed "bottom funnel" search marketing campaigns, targeting high-intent searches related to LSAT Tutoring services. This traffic was directed to a landing page featuring Odyssey's "Free LSAT Consultation" which allows users to sign-up for a free 30-minute LSAT study consultation.

All free membership sign-ups were added to an email marketing sequence designed to softly nurture the prospects over 30 days. We strategically placed call-to-actions within each email, providing prospects with an easy path to sign up for a consultation. To re-engage previous site visitors, we also deployed Retargeting campaigns using Facebook Ads and the Google Display Network. Banner ads were strategically placed on various websites, enticing users who had previously visited Odyssey's website to return and complete the call to action.

THE RESULT

Our efforts generated an average of 68 sign-ups per month to the free study resource membership. From those leads, the email sequence converted an average of 6 tutoring contacts per month. We also generated an average of 45 free consultation leads per month. Average monthly revenue increased by 100%, and we exceeded the YOY income increase target.





financestudio

Where **creativity** and
pragmatism meet

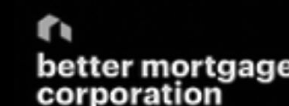
Finance Studio was built and developed by experienced [Vested](#) creatives with deep financial services expertise, as a platform for digital, content, and design projects suited to individual brands' needs and budgets.

Our team has worked with some of the most respected financial brands, but we know that **what works for them won't necessarily work for you.**

The financial services industry may be complex but it's our entire focus. Quality financial-focused writing, digital and design are the outcome of passion and process.



Marcus:
by Goldman Sachs



stretch financial wellness®

**P
A
C
K
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G
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S**

Our packages are designed to reflect in-demand marketing and creative work for financial services brands.

LAUNCH

Looking to jumpstart your brand, but don't know where to start? Cover the basics with this package best suited for smaller or new businesses who want to start getting their name out in the world.

ACCELERATE

Prospects know your name, but you're ready to kick your branding into high gear. Perfect for newly established and mid-sized brands who are about to hit a new stage in their growth and want to announce it with a refreshed and revamped look.

NEXT LEVEL

You've been around the block a few times, but you're ready to take your brand to the next level. Tailor-made for established brands with big ambitions, whether it's attracting larger clients, better talent, or entering new markets.

Flexible, fractional marketing solutions

Designed with financial services companies, and their needs, in mind.

CONTENT CREATION

Website copy
Blog content at volume
Whitepapers, eBooks
Thought Leadership
Email Content

BRANDING

Logo Design
Brand Guidelines
Business Card Design
PPT Template
Word Template
Letterhead

DIGITAL SERVICES

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Social Media Templates

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