



finance
studio

A Group Vested Platform

CASE STUDY SAMPLE PACK

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 can follow a simple 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 four great examples from our very own client experiences at Group Vested you can use to pattern your own case studies.

PLATFORM LAUNCH: ROOFSTOCK

Targeted media campaign to drive investor interest

THE BRIEF

Roofstock, a leading marketplace for single-family rental (SFR) investment properties, was launching Roofstock One, a new investment offering allowing investors to buy shares of single-family rental homes. Roofstock's goal was to attract accredited investors to this new marketplace, and educate them on the economic and tax benefits of rental home ownership, without the responsibilities of being a landlord.

THE APPROACH

We strategized and executed a highly targeted integrated communications campaign that led with offering exclusive first access to Bloomberg, a top tier media outlet widely followed by accredited investors. We worked with both Bloomberg's online editorial staff and broadcast team to secure terminal and online stories, as well as a television segment featuring the Roofstock CEO discussing this new real estate investing offering.

THE RESULT

MEDIA: The media relations portion of the campaign resulted in twenty pieces of coverage in highly targeted media outlets, such as Bloomberg, WSJ, Yahoo! Finance, Globe St., and Think Advisor. Media coverage reached more than 140 million viewers online.

BUSINESS: Roofstock experienced significant, immediate investor interest in the SFR properties listed in their two Roofstock One launch markets. Within 30 days, Roofstock was gearing up to launch in additional markets with confidence.



FEATURED ON:





CONTENT MARKETING: MARCUS BY GOLDMAN SACHS

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.

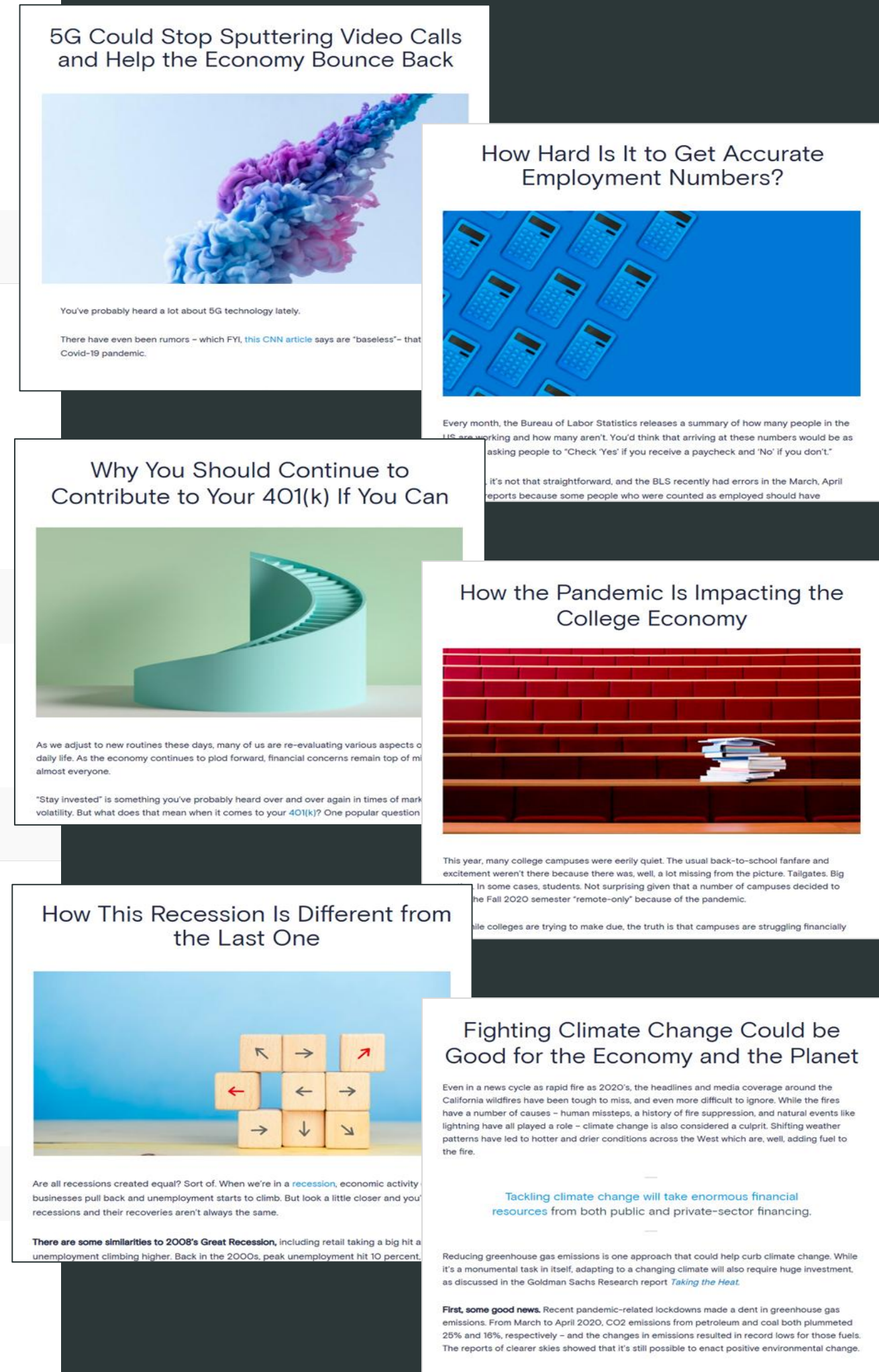
THE APPROACH

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.**



WEBSITE DESIGN: CRITICALPOINT PARTNERS

Form follows function

THE BRIEF

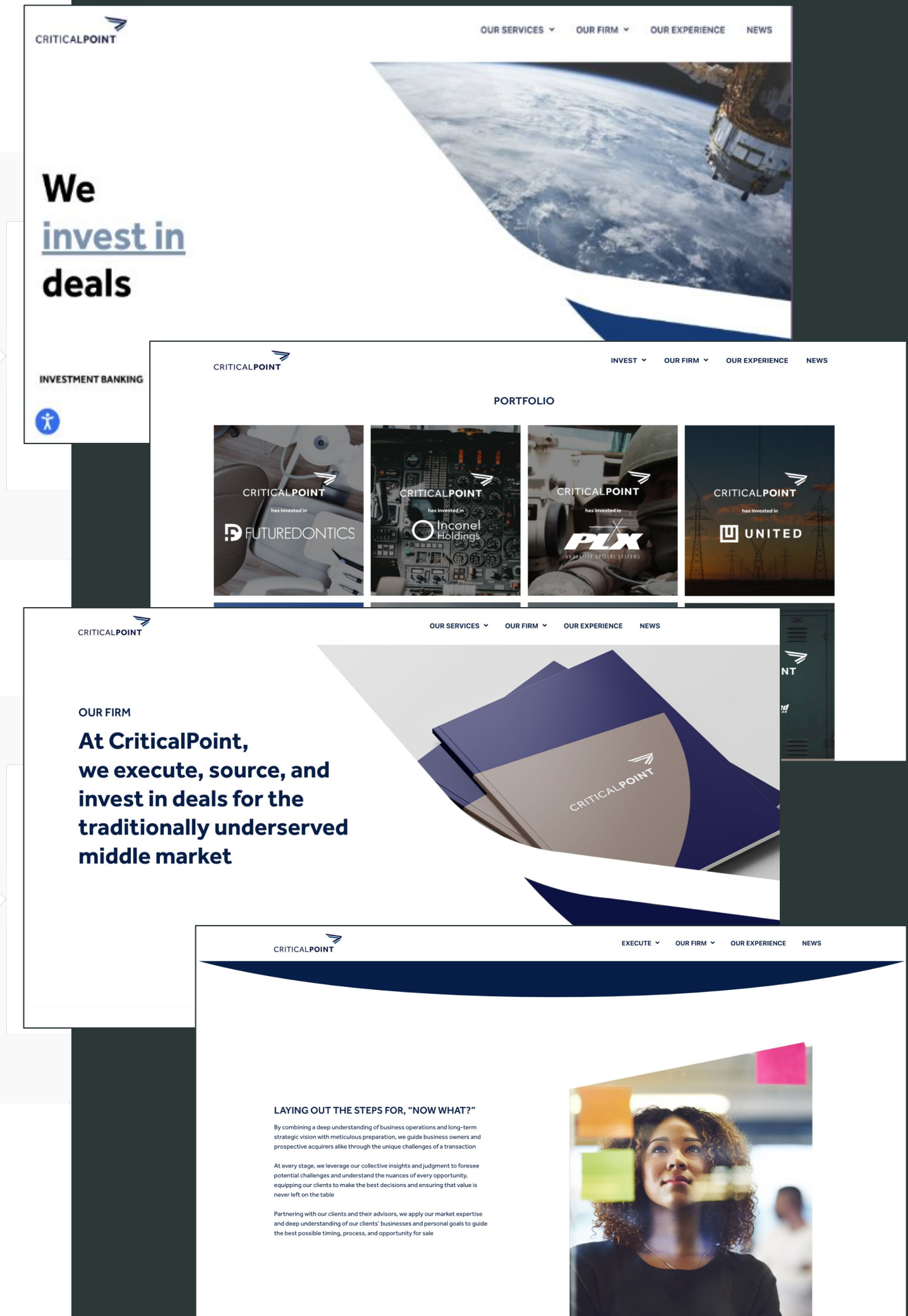
CriticalPoint Partners is a small but incredibly experienced M&A advisory firm that needed to communicate their middle-market focus across multiple service offerings and verticals. They were looking for a website redesign and refreshed copywriting that presented a more defined path to busy business owners looking for help.

THE APPROACH

"Form follows function" is a well known principle from the world of architecture and industrial design. But it also applies to building a strategic user experience on the web. We interviewed internal stakeholders to extract unified messaging and get consensus from multiple team POVs. We next created and developed extensive user personas + mapping profiles to identify the different user journeys for the most effective UX and copywriting strategy.

THE RESULT

We created a visually stunning website with elegant animations and simplified navigation that elevated the brand identity and refined the user experience. We also applied clearer copywriting, highlighting the expertise of the CriticalPoint offering to ensure users were not only led to the right service but more convincingly. We then created new marketing collateral to tie it all together.



DIGITAL MARKETING: INCOME LAB

Driving fintech growth

THE BRIEF

Income Lab offers a software suite that provides financial advisors a new way to build retirement income plans for their clients, while also bringing new tools to the forefront in the retirement planning process. Touting an incredible close rate once a client engages with a demo, Income Lab tapped Vested to help increase the volume of demos/leads in the noisy FA/RIA space.

THE APPROACH

Our team evaluated digital channels that could drive cost-effective leads for Income Lab. Based on extensive audience, keyword, and tactic research, the team narrowed in on the following channels/tactics:

- > Google Search
- > Google Retargeting
- > LinkedIn Ads
- > Facebook Ads
- > Microsoft (Bing) Ads

THE RESULT

In partnership with the Income Lab team, we produced great results within the first 10 months:

- > Efficiently spent \$219k across the various ad platforms, and helped Income Lab ramp up their ad spend from \$9k/mo to \$40k/mo due to the success they were seeing from the paid program
- > Drove over 1,400 leads to the Income Lab sales team, helping them quickly grow and exceed monthly revenue targets
- > Optimized the ad campaigns and website to achieve an overall cost per lead of \$155



SOFTWARE ALL-STAR

#1 Retirement Distribution Planning Tool

T3 | Inside Information Advisor Software Survey 2024

The race to 100% "Probability of Success" is a race to regret.

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LIFEHUB BY INCOMELAB

Ditch the binder and give your clients a one-page plan.

LIFEHUB BY INCOMELAB

Your clients should walk away with clarity not clutter.



DESIGN: ANATOMY OF A STRONG SLIDE

Every element works together



1 SECTION LABEL

Sets context and navigates the story arc.

2 HEADLINE HIERARCHY

Clear, benefit-led headline with emphasis on the key idea.

3 SUPPORTING COPY

Concise, scannable copy that explains what we do and why it matters.

4 BENEFIT BULLETS

Outcome-focused points that show how we drive impact.

SHAPING PERCEPTION

Telling a *Bigger* Story

We don't just secure coverage—we shape the conversations that matter.

Our role is to position your company at the center of the narrative. Through thoughtful, strategic counsel and deep relationships with top-tier journalists and editors, we craft stories that resonate with the right audiences and deliver measurable impact.

- ✓ **Strategic Positioning:** We identify the right angles and data points to frame your story in a way that captures attention.
- ✓ **Earned in Top-Tier Outlets:** We leverage our relationships to land high-impact placements in leading business and financial publications.
- ✓ **Built for Business Impact:** We focus on securing coverage that drives credibility, strengthens reputation, and supports your commercial goals.

It's not just about being seen. It's about being heard.

Defining Your Story

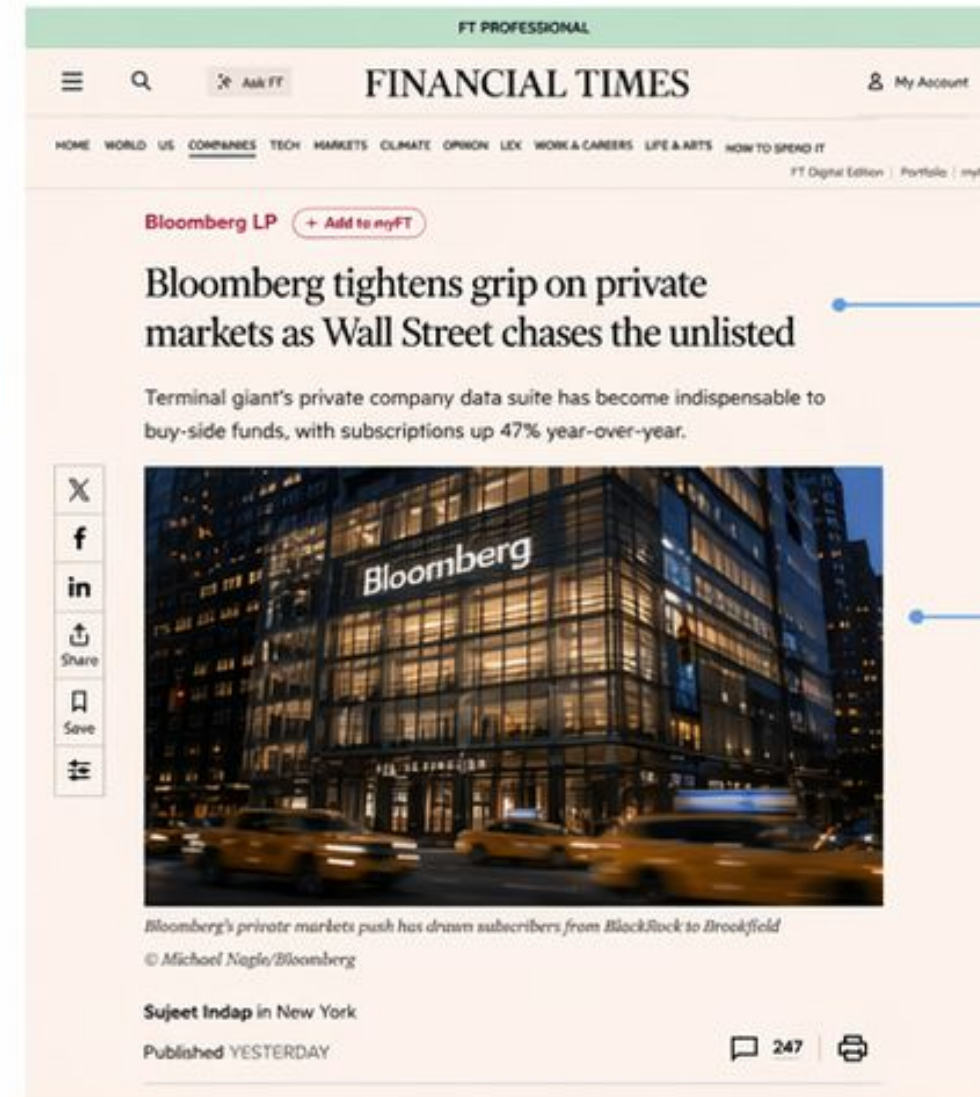
Digital Investing

Investment Products

Cash Management

Workplace Plans

Advisors



6 SOCIAL PROOF

Real-world example that demonstrates credibility and results.

7 RELEVANCE

Example is visually clear, on-brand with the story, and easy to understand.

8 CLEAN LAYOUT

Balanced composition with ample white space for clarity and focus.

5 VISUAL HIERARCHY & CONTRAST

Strong use of color, spacing and typography to guide the eye and create emphasis.

9 STRUCTURE & FLOW

Logical progression from our approach (left) to the proof of its impact (right).

10 BRANDING & FINISH

Consistent brand treatment and polished execution build trust.



FINANCE STUDIO provides bespoke, scalable marketing and communications solutions for financial companies, informed by deep financial industry expertise. Our flexible service model emphasizes streamlined service delivery and results.

Who We Are

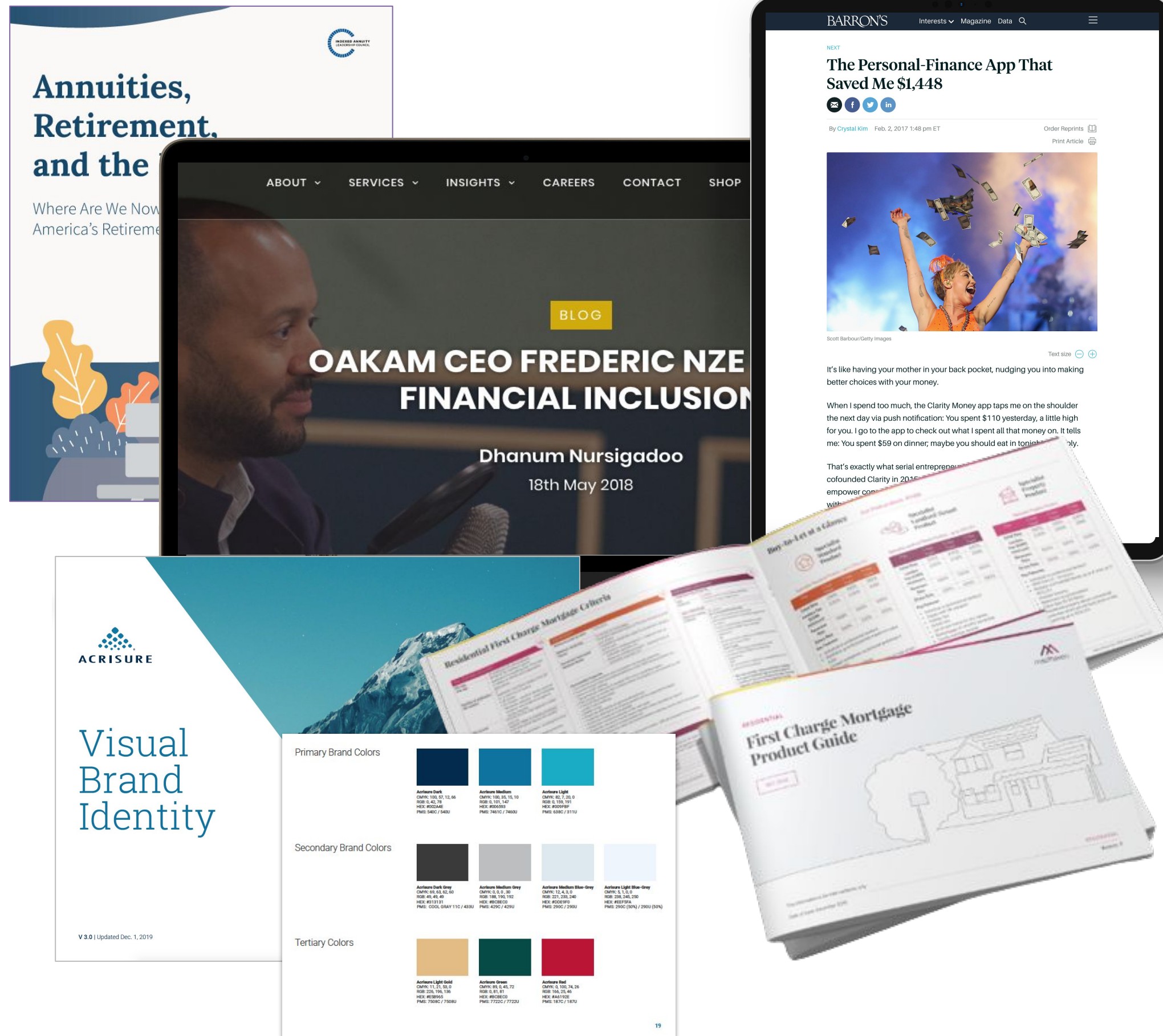
We are a creative and integrated marketing studio specializing in providing marketing and communications services to brands in the financial services sector.

What We Do

We provide content, digital marketing, design and branding, advertising and public relations services in an efficient, flexible, budget-friendly package.

Why We Do It

We know that marketing teams in the financial services sector are under extreme pressure to do more, with less. Demands and expectations are increasing while teams and budgets are shrinking, so we want to be the partner that financial services marketers need to meet their organization's goals





Branding + Creative

- > Brand Identity
- > Brand Guidelines
- > Business Cards
- > Brochures
- > One-Pagers
- > Presentations

Messaging

- > Workshop
- > Framework
- > Review
- > Strategy
- > Brand Discovery
- > Value Proposition

Digital Marketing

- > Website Design & Development
- > Digital Advertising
- > SEO
- > Pay Per Click
- > Email/Social Campaigns

Content

- > Blogs
- > Whitepapers
- > Social Media
- > Thought Leadership
- > Opinion Editorials
- > Sales Collateral

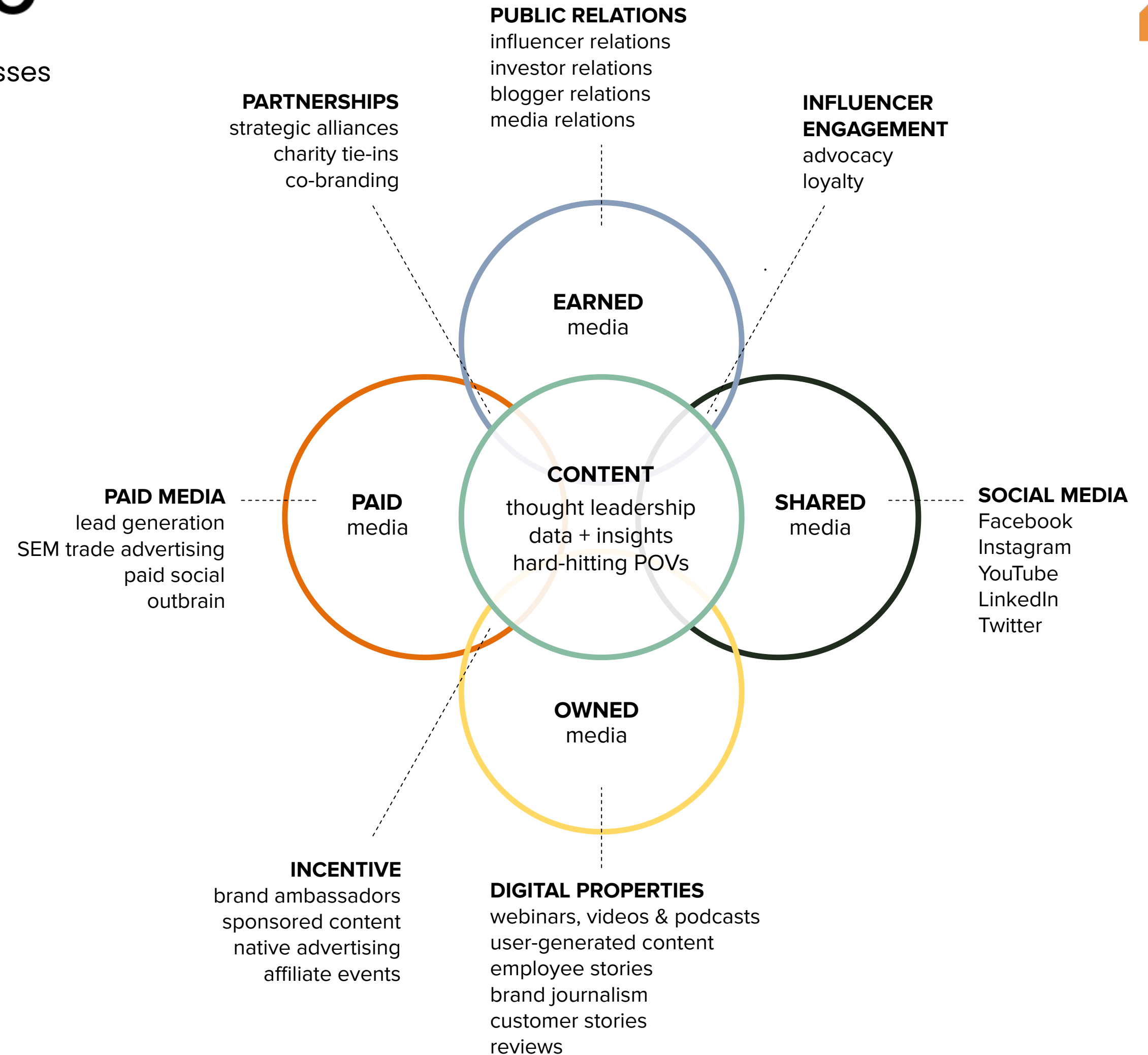
Public Relations

- > Media Relations
- > Speaking Opps
- > Message Development
- > Online Reputation
- > Strategic Consultancy
- > Internal Comms



Our Approach

- > Content at the core
- > Identify and understand target audiences
- > Create a publishing strategy that reaches and resonates with key stakeholders
- > Continuously track, measure and optimize campaigns to improve ROI



Questions?

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