



# Practifi Promote

**To be a leading firm in the wealth management industry requires a high-quality, differentiated level of service. However, when data is siloed in separate platforms, marketing teams struggle to build targeted, personalized campaigns.**

Practifi Promote helps marketers craft data-driven campaigns by giving them access to the data they need to build segmented lists, create more meaningful connections and track campaign performance across the full customer lifecycle.

Practifi Promote is available as a subscription add-on. If you'd like to learn more, get in touch with your CSM or contact a member of our team today.



# The cost of data silos.

In the coming years, millennials will soon inherit the vast majority of the world's wealth. And, as this generation desires more personal and effortless interactions with businesses, it becomes increasingly important for firms to engage different audiences with the right messaging.

Moreover, the demand for greater personalization now extends to the entire customer lifecycle. As a result, existing clients expect uniquely relevant interactions across multiple targeted touchpoints.

However, when important data is segmented across various tools, software, and spreadsheets, firms struggle to tap into customer needs. These silos lead to inconsistencies and inaccuracies that prevent marketers from building highly relevant experiences that help deepen the client-advisor relationship. In addition to operational inefficiencies, fragmented data sources can significantly impact a firm's bottom line. Without a single, unified view of client data, marketing teams struggle to identify opportunities, increase engagement and drive revenue-generating campaigns.

While the cost of siloed data can negatively impact your firm's performance, it's possible to overcome these challenges. By providing marketing teams access to the data they need to build segmented lists, create more meaningful connections and track campaign performance, wealth management firms can deliver more personalized, high level services.

“While 83% of companies stress the importance of turning data into actionable insight, only 22% feel their company is successful at doing this.”

HARVARD BUSINESS REVIEW, 2020.  
"OVERCOMING BARRIERS TO DATA IMPACT"



Build segmented lists



Create meaningful connections



Track performance

# Craft data-driven campaigns.

Practifi Promote helps marketers leverage data-driven insights to provide personalized experiences that delight clients, engage prospects and drive results for your firm. With access to Practifi's Marketing app, marketers can build highly segmented lists, create more meaningful connections and track campaign performance across the full customer lifecycle.

## ✓ Marketing App

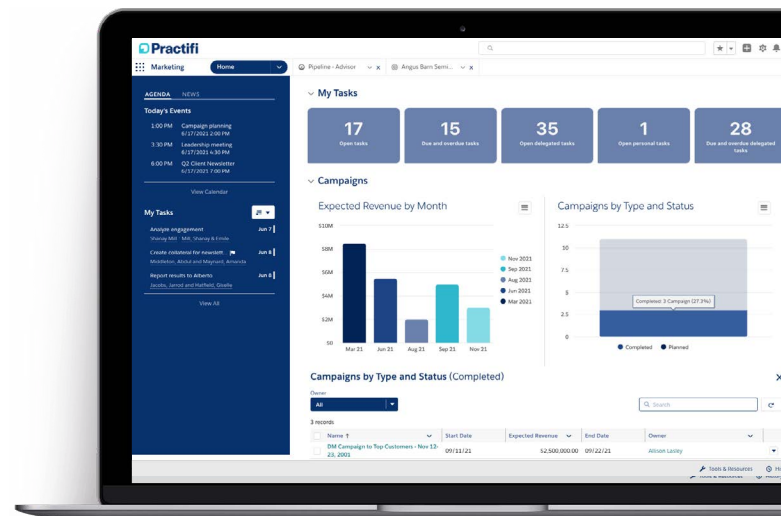
The Marketing app provides marketers access to Practifi data so teams can gain insights, create highly segmented lists, manage campaigns, send emails at scale and track performance.

## ✓ Campaign Object

Unlock campaign functionality within Practifi and use 34 new fields to capture campaign data and create customized reports.

## ✓ Revenue Attribution

Connect the firm's pipeline to current campaigns, providing greater insight into campaign influence on realized revenue.



The screenshot shows the Practifi Campaign details page for 'Getting to Know You (Clients)'. The page is divided into sections: BASICS, MEMBERS, and NOTES & FILES. The BASICS section includes fields for Campaign Name, Campaign Owner (Steve Miller), Parent Campaign, Type, Email, and Description. The BUDGET & FORECAST section shows Budgeted Cost in Campaign, Expected Revenue in Campaign (\$750,000), and Expected Response (%). The CAMPAIGN PERFORMANCE section shows Num Sent in Campaign (0), Responses in Campaign (20), Actual Cost in Campaign, and Contacts in Campaign (31). The SYSTEM INFORMATION section shows Created By (Steve Miller, 11/17/2021, 10:07 AM) and Last Modified By (Steve Miller, 4/27/2022, 11:01 AM).

# Scale marketing excellence.

Business management platforms and marketing automation tools are designed to help you accomplish the same goal: to build deeper, more personalized relationships with your clients and prospects by enhancing your interactions.

Practifi Promote enables additional capabilities with marketing automation platforms like Pardot, Marketing Cloud and Hubspot. Data can be shared between platforms making it easier to track, manage and organize across all your teams and systems.

By integrating with best-in-class platforms, marketing teams can leverage Practifi data to scale marketing campaigns and create targeted digital journeys that drive marketing excellence. As a result, your firm will enjoy improved operational efficiency, seamless data exchange and deliver more personalized experiences.



## Get started today.

Contact a member of our team to get started with Practifi Promote today.

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