



## CASE STUDY

# How Rob Beadle is Helping Vision IFAs Reach New Clients



“Working with Rob has made a huge difference to our marketing plans. He’s efficient, professional and punctual. And the end result is always good. It’s great to have someone we can rely on.”



**David Abel**

Independent Financial Advisor, Vision IFAs

## Location

United Kingdom

## Industry

Financial Services

## Services Provided

Copywriting

- Content marketing
- Blog content creation
- Website copywriting
- Animation script writing

## Client

### Vision IFAs

Vision IFAs is a firm of independent financial advisors and pension specialists. From its 3 offices across West Yorkshire, it helps clients to plan their retirement and protect their business finances.

## Challenges

### Attracting New Leads Efficiently

For many years, Vision IFAs provided pension advice and retirement plans for teachers. The successful business used face-to-face seminars to gain these clients.

But with changes in school funding, the value of the seminars faded. What's more, the company was reliant on an ageing base of existing clients.

As a result, when David Abel joined the team he wanted to change the company's marketing. David realised that Vision IFAs had to reach out to a new group of clients in a new way.



“A big focus for me was to generate leads and interest from our website. Specifically with our target audience of business owners. I saw the website as a marketing asset that we needed to utilise more. Because if you generate leads online, you can reach a huge audience.”

# Solution

## Content Marketing with a Professional Copywriter

David decided to work with a copywriter to create content for his digital marketing plan. That's when he met Rob Beadle.



“Content is a smart way to reach out to clients without the hard slog of seminars or cold calling. You can automate the process online too.

I'd heard Rob speak at an event about content marketing and it really stuck with me. When we met, I saw that he understood what we were looking for, was straight to the point and had a finance background.”

First, David and Rob agreed on how to target Vision IFAs' ideal clients with a series of helpful articles. This allowed Rob to research the subjects that mattered to business owners. He then wrote blog posts to educate them and answer their questions.

As a result of this work, David asked Rob to write extra content. This included articles on pension planning and a landing page for clients who want to simplify their pensions.

Lastly, Rob created a set of animation scripts for David's digital marketing campaign.



“Before Rob starts writing, he shows us what the articles are going to cover. So we have a chance to make changes. It's a much more professional way of working.

Rob is very efficient with our time too. Our briefs are 15-minute phone calls and then we only have to read the finished article. He also structures the articles so it's easy for us to review them.”

# Results

## Improved Search Results and Credibility

Vision IFAs is now on the first page of search results for 300% more of their keywords. But, as well as the SEO benefits, there's been another major success from content marketing.



“The content articles have made a real difference to our credibility. That's crucial in our industry. Because credibility is the way in the door and trust is how you close with clients. And that's the goal.”

After 10 months of working with Rob, Vision IFAs now have a bank of articles to use as marketing assets. This allows David to repurpose the content to reach clients through LinkedIn too.

Content is central to Vision IFAs' marketing plans. So David had looked at using several copywriters. But now they only use Rob.

“My plan was to try a few copywriters to see who was the best. But now that's not even a question. Because if we've got anything that we need writing, we go to Rob.

We know it'll be written within our timelines. It's going to be as easy as possible. And we'll be really happy with the end result.”

# Want to talk to your future clients?

You've got to attract and engage your leads -  
that's where I can help.

Get credible content to start a conversation.

[CONTACT ROB BEADLE](#)