

UNEQUALLED PERFORMANCE

that stands out in a
sea of sameness

B2B

Equity Methods

01 WE GET YOU

What happens when a quickly growing firm needs help taking their marketing to the next level?

Equity Methods is a consulting firm with a national presence that specializes in stock-based compensation and other complex securities. The company had recently spun out of one of the country's largest banks and was ready to rebuild its marketing function from scratch. Others in the industry are large brokerages and software companies with large marketing staffs and significant resources. They arrived at our doorstep ready for action with extensive internal and third-party survey results related to service quality and thought leadership preferences. Just like us, they are a small firm with big ambition: to produce a world-class marketing and communications program.

We understood immediately that they needed:

- A collaborative marketing partner—not simply a vendor—to act as an extension of their team;
- All marketing efforts to support their relational and expertise-driven approach to outreach, rather than being sales-oriented;
- Flexibility to accommodate the schedules and workstyles of their collaborative, hands-on team of consultants;
- A dedicated CSS team employing an agile approach with rapid execution.

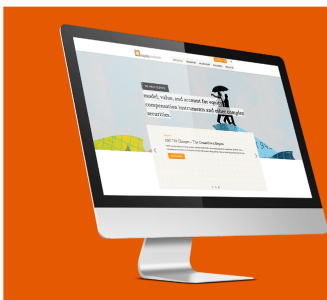


02 WE GUIDE YOU

How do you tackle that many projects with a new relationship?

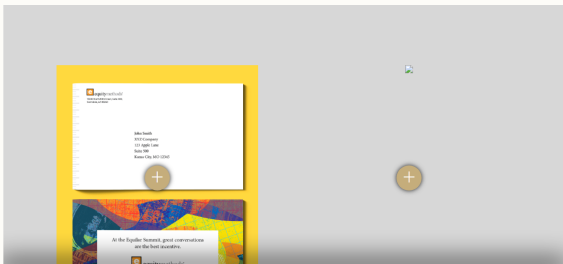
The company was known for thought leadership and had a solid reputation within the industry. However, the existing website and visual branding lagged the company's industry reputation and reflected its origins as a pure product company rather than the technology-enabled service provider that it had become. We assigned a dedicated account team and leveraged our web of suppliers and partners to implement an aggressive calendar with multiple, concurrent outreach programs. We also augmented their marketing automation software with best-in-class email templates and techniques to enhance deliverability and open rates. The visual brand was transformed with a more refined palette featuring custom illustrations that highlight the sophistication of Equity Methods' thinking. We also enhanced the company's presence on the web with a new site featuring the refreshed brand, a content management system with inter-proof updating features, and a knowledge-management filtering system.

Capabilities utilized:

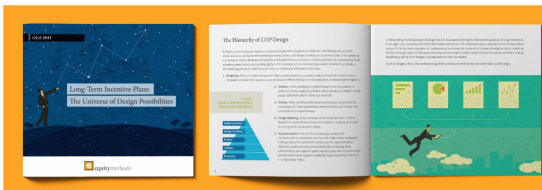


Website Features and Functionality

- + Responsive Design
- + Robust Knowledge Center with Filters and Sorting
- + Custom Wordpress CMS



Equity methods invitation



03 WE GROW YOU

How do you continue to build the relationship from there?

Equity Methods has achieved some impressive results since we began working together. The brand enhancements have increased the aesthetic and tactile appeal of thought leadership direct mailings while slashing the time to execute by an average of 8 days, resulting in improved delivery timing and a 100% campaign success rate. Additionally, as testament to the consultative nature of our partnership, circle S is supporting their outreach efforts in two brand-new service lines and are advising them on staffing considerations for the marketing function as they move forward.