

CASE STUDY

Investors Associated:

B2B & B2C MARKETING

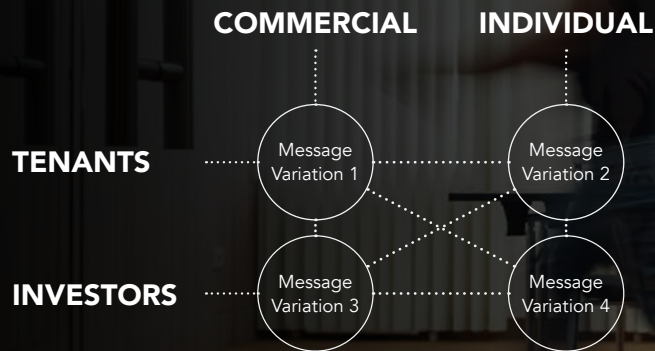


INTRODUCTION

Investors Associated was ready for growth, looking to double the size of their portfolio. But growth doesn't happen without capital, capital doesn't flow without both new investors and tenants, and they didn't know how to reach the potential partners in their market, particularly over their long sales cycle.

CHALLENGES

- Needed to reach new partners but didn't have the research to effectively target them
- Wanted to increase cash flow but didn't have a strategy to attract new tenants and investors
- Required varied and specific messaging that would resonate with the needs of different audiences, but didn't have access to a team of writers to craft it



If they didn't manage to connect, the business would have remained stagnant, which doesn't provide good returns for investors and leads to losing partners.

In this case study, we'll explore what Investors Associated did to reach their wider target audience, how they differentiated themselves from their competitors, why it worked, and what the results have been over the past five years.



ABOUT INVESTORS ASSOCIATED

- Founded in 1970
- HQ in Wisconsin, locations in 7 states
- Real estate investing and development
- B2B and B2C model with investment opportunities and tenant vacancies for individuals and businesses in properties ranging from residences to office buildings to industrial sites

GOALS

- Increase in new investors
- Increase in new tenants
- Expand brand awareness
- 20% portfolio increase
 - They had \$420m+ assets under management with the goal of reaching \$500m by the end of 2024

WHY THEY CHOSE IMPACT

- Long-term partnership
- Predictable monthly fee
- In-depth business audit took place before making any recommendations
- Access to a full team of creatives, strategists, developers, account managers, and more



ASSESSMENT

Impact's assessment included in-depth research into Investors Associated's:

- Market
- Industry
- Customers
- Target audiences
- Existing efforts
- Competitors
- And more

By getting this clear view into their current position, Impact found a number of Investors Associated's differentiators that are particularly attractive to their target audiences:

- When someone invests, they become an equal partner in all of Investors Associated's properties rather than just one or two, decreasing risk and allowing an equal vote in all matters
- Investors Associated has a limited number of partners, so shares aren't diluted
- Property management is handled in-house, so the value continues to appreciate over time, rather than making a single gain when the investment is flipped

Additionally, Impact uncovered Investors Associated's unique sales funnel that sees more success from individual interactions than traditional research done by consumers.

Combining these pieces of information made it clear that an outbound strategy focusing on these differentiators was the best way to get the attention of their potential future partners.

NEXT STEPS

1. Investors Associated had to make sure existing collateral was polished and correctly messaged. Impact rebranded their core assets and redesigned their website with custom copy designed to speak to the needs of each of their audiences.
2. Impact and Investors Associated created a long-term, omnichannel strategy that includes paid media, social media, photography and videography, print advertising, and beyond. We also helped them get a partnership with the Financial Planner's Association (FPA) and sponsor local schools and sports teams to increase visibility.
3. Impact professionalized branding and communications at their properties. Partners now feel more personally invested and likely to renew with quarterly team, tenant, and investor newsletters. And tenant events take place regularly, increasing involvement from the local communities.

RESULTS

- **10-15% ANNUAL GROWTH**
in new equity from investors
- **HIGH OCCUPANCY RATES**
in commercial and residential properties
- **50% ANNUAL COST SAVINGS**
by outsourcing a full marketing team and tech stack

CONCLUSION

Investors Associated needed marketing expertise to achieve the growth they were looking for. By working with Impact, they were able to get access to researchers and strategists who knew how to get in front of the right people, and creative experts who knew how to resonate with them.

The complete managed marketing system led to higher gains for lower costs, and has positioned Investors Associated to keep growing on a much larger scale for the next five years of our partnership and beyond.

START GROWING

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impactmybiz.com/marketing

