intention.ly x JOURNEY STRATEGIC WEALTH

Scaling Advisor Recruitment Through Strategic B2B Campaigns

KEY RESULTS:

Generated 192 new leads and 49 SQLs across two campaigns

51% landing page conversion rate on toolkit downloads

Secured $120M advisor recruit through thought leadership content

All results driven organically through email and social media

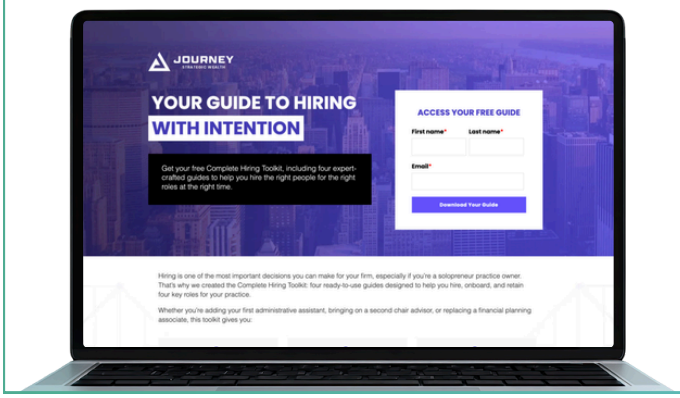
THE CHALLENGE:

Turning Organic Growth into a Scalable Recruitment System

Journey had proven market fit with independent advisors and had a strong track record of organic growth through referrals, but hitting their ambitious goals—$2B in new AUM and 5-6 new advisors—required a more structured approach.

While their advisor-facing content performed well, no campaign framework existed for lead capture, nor did they have a centralized lead database for proactive outreach. The firm's value proposition was compelling and resonated with their ideal advisor firms, but they needed a repeatable growth engine to get in front of the right advisors at scale.

Journey oversees nearly $4 billion in assets and is designed to turbocharge an advisor's organic growth by creating significant capacity in the practice through middle and back-office support, and by providing tools for practice management implementation.



INTENTION.LY'S ACTION PLAN:

After a few weeks of discovery and diagnosing which aspects of a marketing strategy would be most impactful, the team built a systematic B2B recruitment engine pairing thought leadership with conversion-optimized campaigns and targeted outreach.

Strategic Lead Database Development

We built a precision-targeted prospect list based on Journey's exact ICP criteria: $150M-$450M AUM teams at Carson, Commonwealth, Raymond James, LPL, Northwestern Mutual, RBC, and Cetera, plus independent RIA platforms. All prospects met strict qualifications including minimum $1M revenue, fee-based business models, model portfolio usage, team-based practices, and CFP credentials.

Campaign Architecture and Execution

Our monthly B2B campaigns combined original thought leadership with actionable advisor toolkits. Each campaign included conversion-optimized landing pages, five-touch email sequences, LinkedIn content distribution, and blog posts. Two flagship campaigns launched in August and October 2025.

Thought Leadership and Media Relations

We worked with founder Penny Phillips to amplify executive visibility via a prescriptive strategy including bylined articles, media placements, and LinkedIn thought leadership tied to advisor growth themes. One piece generated press coverage in two industry outlets and directly led to a $120M advisor recruit in August 2024.

Measurable Impact and Marketing ROI

Our highest-performing advisor M&A campaign delivered immediate pipeline impact, reaching over 3,926 advisors. The landing page converted at 51%.

Beyond downloads, the funnel drove real business results, including 192 new leads, 31 MQLs, 49 SQLs across contacting and scheduled stages, 4 active opportunities, and 2 VIP-level contacts.

The professional development campaign generated high-quality engagement from Journey's exact ICP, including three $100M+ practices.

Get in touch to learn more.

Let's talk about what we can work together to achieve.
Contact Kelly Waltrich at kelly@growintentionally.com,
visit www.intention.ly, or scan the QR code.