LinkedIn 2015 Sponsored Updates Campaign Test

December 2015

FOR INTERNAL USE ONLY

© 2015 CNL Intellectual Properties, Inc. All Rights Reserved.
CNL® and the Squares Within Squares design trademarks are under license from CNL Intellectual Properties, Inc.

CNL Securities

Campaign Overview

What

- CNL Securities launched a campaign test leveraging LinkedIn's Sponsored Updates functionality.

When

- Dec. 7, 2015 to Dec. 31, 2015

Why

- The goal of the campaign was to increase the number of LinkedIn followers among a specific target demographic.

Campaign Demographics

- Total audience: 201,000+
- Job Titles: 40 (Key titles: Financial Advisor, Investment Advisor, Financial Planner, Investment Consultant, Registered Investment Advisor, Wealth management Advisor)
- Industries: 3 (Financial Services, Investment Management and Insurance)

Total Budget = $5,000

- LinkedIn provides users with two billing choices when delivering a Sponsored Update: cost-per-click (CPC) and cost-per-thousand-impressions (CPM). We chose the CPC model.
- Initial bid for each impression was $9; final bid was $15.
- Initial daily maximum spend was $100; final daily maximum spend was $250.

CNL Securities

Campaign Logistics

Posts

- Four posts announcing two Practice Management articles were scheduled for a rotational distribution among our target audience starting in Dec. 7.
- Articles announced were “How to Keep Your Best Clients” and “Developing Your Client Appreciation Program.”
- Once distributed, posts with the highest performance were scheduled first in the rotation.
- In Dec. 14, two posts were removed from the rotation due to low engagement.

User Experience

- Three-step process to acquire any of the two articles:

Step 1: Click On Post

Once the post appeared on a LinkedIn member’s home page (i.e., an Impression), he or she had the option of following CNL Securities directly, as well as clicking on the post.

Step 2: Fill Out Form

After clicking on the post, readers were directed to Web Landing Page containing a form with required fields. Once completed, LinkedIn users were directed to a Confirmation Landing Page.

Step 3: Download Article

Finally, completing and submitting the form triggered Marketo to distribute an email containing the link to download the article.

User Experience: LinkedIn Posts

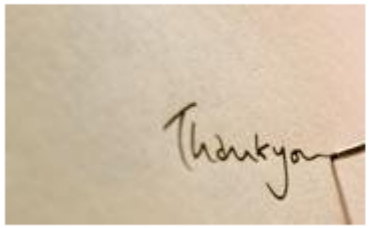
Article: “Developing Your Client Appreciation Program”

CNL Securities Corp.

Developing Your Client Appreciation Program

bit.ly · A well-planned client appreciation program plays an essential role in the success of every financial advisor's career. Learn tips to develop a client appreciation program from Dr. John Rhodes Jr., VP of Practice Management for CNL Capital Markets.

CNL Securities Corp. Delete



Developing Your Client Appreciation Program

bit.ly · Creating a client appreciation program is a great way to show gratitude to those whose contributions have helped you achieve professional success. Our article discusses four steps to help you develop an effective, annual client appreciation program.

< No. 1 most engaging post

CNL Securities

User Experience: LinkedIn Posts, *continued*

Article: “How to Keep Your Best Clients”

CNL Securities Corp.

How to Keep Your Best Clients

bit.ly · Identifying the clients who are most vital to your business is the first step toward retaining them. Our practice management article shares practical ideas to help you implement a client-focused business. Read the article here: http://bit.ly/1lzj2fB

CNL Securities Corp. Delete

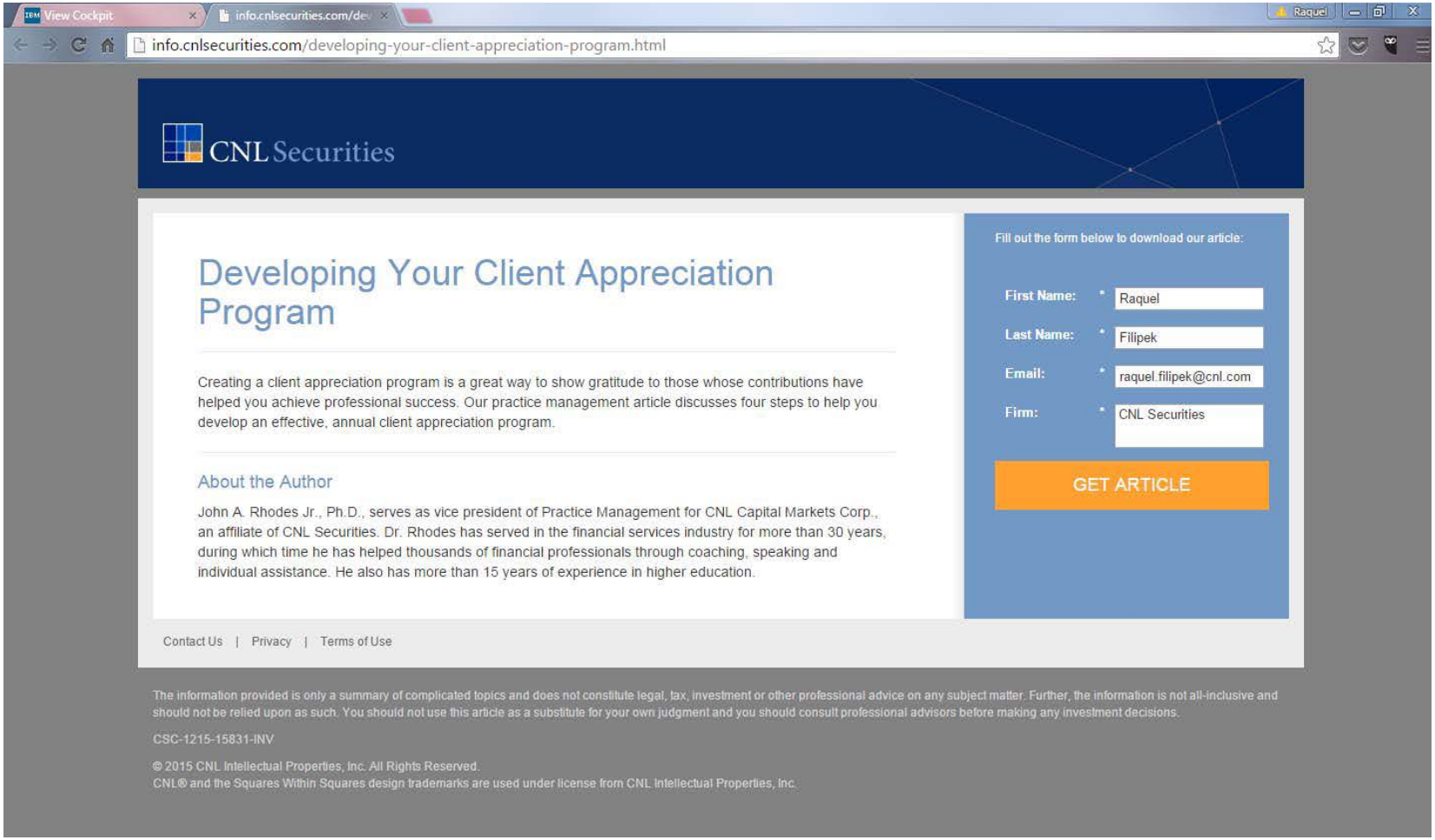
How to Keep Your Best Clients

bit.ly · From the apps on your phone to the way you take your coffee, practically everything can be customized. Our practice management article provides tips to help you implement an individualized, client-focused approach to reach your best clients.

< No. 2 most engaging post

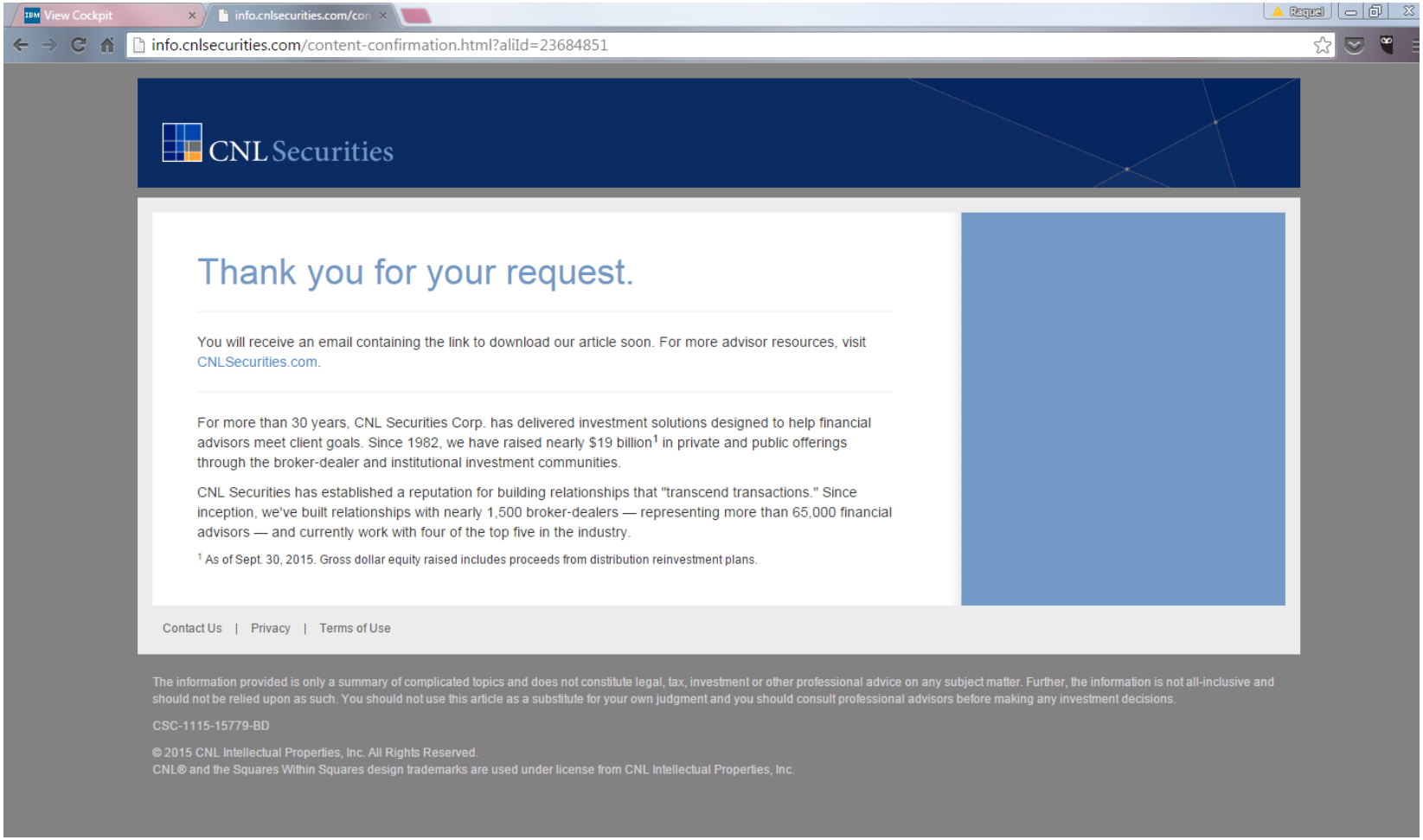
CNL Securities

User Experience: Web Landing Page



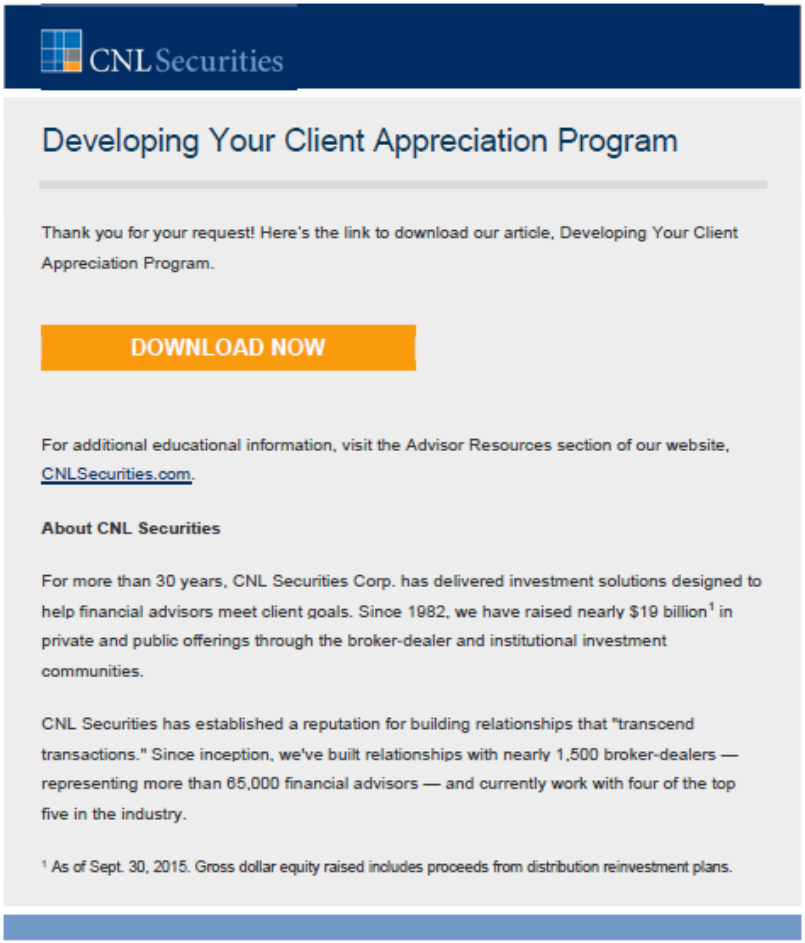
FOR INTERNAL USE ONLY

User Experience: Confirmation Web Page



User Experience: Email With Article Hyperlink

Email With Hyperlink to Download Article



CNL Securities

Developing Your Client Appreciation Program

Thank you for your request! Here's the link to download our article, Developing Your Client Appreciation Program.

DOWNLOAD NOW

For additional educational information, visit the Advisor Resources section of our website, CNLSecurities.com.

About CNL Securities

For more than 30 years, CNL Securities Corp. has delivered investment solutions designed to help financial advisors meet client goals. Since 1982, we have raised nearly $19 billion[1] in private and public offerings through the broker-dealer and institutional investment communities.

CNL Securities has established a reputation for building relationships that "transcend transactions." Since inception, we've built relationships with nearly 1,500 broker-dealers — representing more than 65,000 financial advisors — and currently work with four of the top five in the industry.

[1] As of Sept. 30, 2015. Gross dollar equity raised includes proceeds from distribution reinvestment plans.

The information provided is only a summary of complicated topics and does not constitute legal, tax, investment or other professional advice on any subject matter. Further, the information is not all-inclusive and should not be relied upon as such. You should not use this article as a substitute for your own judgment and you should consult professional advisors before making any investment decisions.

© 2015 CNL Intellectual Properties, Inc. All Rights Reserved. CNL® and the Squares Within Squares design trademarks are used under license from CNL Intellectual Properties, Inc.

CSC-1215-15831-INV

This email was sent to: raquel.filipek@cnl.com

This email was sent by:
CNL Securities, managing dealer, member FINRA/SIPC
450 S. Orange Ave., Orlando, FL
CNLSecurities.com

Follow CNL Securities on LinkedIn

If you no longer wish to receive these emails, click on the following link: Unsubscribe

Results

LinkedIn KPIs

- Impressions: 74,086
- Clicks: 512
- Likes: 29
- Shares: 3
- Followers: 44
- Click-Through Rate: 0.69%
- Avg. Engagement Rate: 0.79%
- Avg. CPF: $114
- Avg. CPC: $9.77
- Avg. CPM: $67.49

CNL KPIs

- No. Forms Completed (Conversions): 82
  - CA article: 78; HTKYBCs: 4
- Landing Page Conversion Rates:
  - CA article: 16.74%
  - HTKYBCs article: 8.70%
- Known Leads Generated (in SFDC): 28
  - Producers: 10
  - Non-Producers: 18
  - RIA: 2
- Unknown Leads Generated (not in SFDC): 54
  - RIA: 7*
- Cost Per Conversion: $61

* Of the unknown leads, 7 could be identified as RIA. There could be more, but that requires more in-depth research. All names have been provided to the RIA team.

FOR INTERNAL USE ONLY

Results Comparison

Channel	Budget	Timeframe	Leads Generated	Impressions	Clicks	CTR	Eng. Rate	Avg. CPC	Avg. CPM
LinkedIn Benchmark (for FinServ marketing to Fin Profs)						0.4%–0.6%	0.5%–0.7%		
Sponsored Updates	$5,000	25 days (Dec. 7–Dec. 31)	29	74,086	512	0.69%	0.79%	$9.77	$67.49
CCT Ad Campaign	$155,340	92 days (Aug. 1–Oct. 31)	N/A	4,757,107	2,536	0.05%	N/A	$61.25	$32.65
CHP Ad Campaign	$140,000	50 days (July 15–Sept. 3)	N/A	3,951,882	3,476	0.09%	N/A	$40.28	$35.43

CNL Securities