



CASE STUDY

# Sedulo

**Force24**<sup>™</sup>  
Marketing Automation

**SEDULO**

**SEDULO**



**Adam White**

Marketing Manager at Sedulo

Sedulo enhances engagement  
through Marketing Automation

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Delivering tailored marketing automation comms that segment and speak directly to customers for a rapidly growing financial services organisation.

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# Where were we?



**In the hot seat:**

Adam White,  
Marketing Manager

**Company:**

Sedulo

**Focus:**

Bespoke finance  
comms for businesses  
and individuals

**Sector:**

Financial Services

**Size:**

130 staff

As a firm dedicated to creating positive impact and growth for businesses, people and communities through financial services support, Sedulo began life as a team of three providing Manchester's entrepreneurs with industry-focused, hands-on expertise.

However, we expanded our offering – since those humble beginnings in 2009 – and now cover tax planning, corporate finance, mortgages, wealth management, funding solutions and more. Our exponential growth has led to us being recognised as one of the fastest-growing finance firms in the UK.

Prior to developing a 130-strong workforce and opening premises in Leeds, Manchester, and London – with Liverpool on the horizon – we required an agile marketing technology platform that moved at the same rapid pace as we did, and matched our ambitions to speak directly to customers and prospects.

We had been using another email marketing tool, but it simply wasn't flexible enough. Neither was it capable of gleaning the critical data we needed to securely manage and segment our audience so that they consistently received hyper-relevant email comms.

With a real focus on offering a bespoke, personalised experience, we required a flexible system that matched our ambitions of providing each individual and business with tailored financial services content they *wanted* to consume, at the right times and via their preferred methods of communication.



# What did we go through?

Email marketing has continued to play a pivotal role in our overarching communications strategy and how we analyse engagement levels. We understand how real-time, granular detail helps us to understand customers' online behaviours on a much more sophisticated level. We wanted to utilise the information even further – segmenting individuals based on their interactions and of-the-moment interests.

Having met Force24 at a trade show back in 2017 and discovering the capabilities of its marketing automation platform, we were blown away. The system not only spoke our language, but the team demonstrated vast financial services experience and understood our sector pain-points straightaway.

Speaking to us in a jargon-free manner, Force24's automation consultants discussed how we could step up our digital comms, move away from 'batch and blast' style messaging, and instead create personalised email campaigns that positively impacted ROI and covered trending topics in the industry – whether that was accounting, payroll or maximising high growth business opportunities.

In 2017, we plugged in Force24 following a swift onboarding which took only five working days. Two members of our marketing team were also trained to man the system from our Manchester base. In the past 24 months, the dynamic platform has enabled us to better talk with relevant customers – all at the click of a button. It has played a huge part in our exponential growth of late, powering us towards:

- £2.65 million in turnover (17% growth)
- Opening two further premises – in Leeds and London – with another (Liverpool) in the pipeline
- Developing a nine-strong marketing department – all of whom confidently use Force24 to speak to customers and send real-time internal comms
- Onboarding each recruit with crucial new starter in-house guidance and policies – all sent via Force24 and directly into their inboxes

And our first campaign enabled us to:

Reach out to our database to promote our ticketed networking event 'SeduloFEST' via a series of emails. We gained a great deal of interest in booking tickets and – following its success – this encouraged us to run more in the same vein.

# Where are we now?

Throughout COVID-19, instead of hosting our regular - and popular - face-to-face events, we have been running helpful webinars and podcasts to continue assisting customers with their financial services queries.

Using Force24, we've been promoting these sessions via personalised email journeys - all of which included a call to action push towards how people can register.

Our webinar and podcast audience figures have ranged from between 15,000 to 86,000, whom have taken in a balance of advisory, community-based and sensitive sales-specific messaging that has been created alongside Force24.

Follow-up comms tailored around one of our technical webinars - for example, the forensic accounting topic of 'Criminal lifestyle - what it means and what the implications are' - had a very specific audience. However, complete with the recording of the session, we were able to achieve open and click rates of 48% and 31% respectively.

Other notable results throughout a challenging, but pivotal 2020, have included:

- Strong engagement with our newsletter and regular updates - in particular, information concerning furlough gained a 61% open rate
- Our 'How you helped inspire kids during lockdown' and 'How to thrive in retail' pieces of content also secured respective 30% and 20% open rates

We've recently launched a new website and have been utilising email comms to let recipients know about our brand developments.

Force24 will continue to play a substantial role in the evolution of our marketing strategy. We want it to help us refine our audience and tailor the information accordingly so that individuals are receiving details about upcoming events they're more likely to be interested in.

# Summary

Although our marketing team is very confident in the system now, it's really important to know that Force24 is on hand to help with anything we need - from strategic advice to training new starters on the platform. We really do make good use of the organisation's 'support for life' promise and the two-minute SLA option.

# Get in touch

If you want to talk about your marketing  
call us **0845 272 5990** or email  
**info@force24.co.uk**

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