



Keeping the number one tech platform front of mind

The Background

Transact is the number one technology platform for wealth managers, financial advisers and paraplanners, and since 2010, has topped the Investment Trends and Core Data surveys of over 1,000 advisory professionals.

Its marketing messages change throughout the year but its overarching objective is to help keep advisers up to date with the continual developments at Transact (price reductions, new functionality, survey results etc).

The Brief

Working with Centaur, the company drives selected marketing messages through print and digital advertising on Money Marketing and through organising and attending events, including the recent Money Marketing Awards and Platform.

The Results

Centaur delivered a staggered digital communications campaign to promote three key Transact messages between August 2015 and March 2016:

- Reductions in its platform charges
- Investor authorisation – new functionality on the platform, which saves advisers time and helps them to work more efficiently
- Transact’s market leading service backed up by independent research by Investments Trends and Core Data surveys

Transact’s digital campaign was built with Centaur’s Money Marketing brand at its core and the company has enjoyed incredible results:

- Click throughs achieved five times the industry benchmark average
- Impressively low CPC ratios
- Side bar advertising performing head and shoulders above the norm

Transact also enters, attends and supports Centaur events, including Money Marketing, where Transact won Best Platform in June 2016, and also Platform. Attendance at the events is viewed as a useful industry networking tool by Transact.

