

SNAPPY KRAKEN FINANCIAL ADVISOR MARKETING



## Prepare to Grow with Financial Clarity and Vision

Founder and CEO Robert Sofia launched Snappy Kraken to accelerate growth for financial advisors through unique, personalized automated marketing campaigns and workflows. The company creates original marketing content and ready-made campaigns that automatically perform critical marketing tasks and track specific growth objectives. Exclusive territory licenses give clients the sole rights to content use in their region, ensuring that they can deliver content that stands out in a saturated market.

Snappy Kraken's automated content marketing at scale has won awards across both FinTech and Marketing sectors. In 2016, the company won the XYPN FinTech Competition, and early successes secured investor interest and a \$3.5M seed round of funding. Snappy Kraken's disruptive marketing platform has earned recognition in the annual MarTech Breakthrough Awards for the past three consecutive years as Best Overall Content Marketing Company, and continued growth has positioned the company for a second round of funding.

## CHALLENGE

**"We needed to map multiple realistic growth scenarios for our board and internal review."**

- Robert Sofia, CEO

Following Series A investment, Snappy Kraken founder Robert Sofia realized they needed to mature the company's finance and accounting functions. The benefits would be twofold: prepare board-level projections to better manage growth, and increase transparency to welcome next-level investor interest and scrutiny.

Sofia also recognized the benefits of sophisticated financial modeling, yet knew that time constraints would limit his ability to fully develop what he envisioned. He was introduced to Adventum, and they've integrated well.



### Value Stakeholder Alignment

Adventum helped position Snappy Kraken to present clear, detailed financial analyses to their board members and potential investors. By establishing a more sophisticated financial model, they empowered company leaders to secure stakeholder approval and draw investor interest.

### Move Forward with Confidence

Capital funding and growth initiatives often hinge on a company's ability to produce clear financial reports that demonstrate consistent growth and a reliable business model. Ready access to key financial indicators and metrics empowers companies to communicate value, make data-backed decisions, and greatly boost investor confidence.

### Set Objectives, Drive Outcomes

Knowledge is power. Adventum helps companies get out of the weeds to view their big financial picture, close gaps, and establish a stable growth trajectory. With a steady hand on the financial helm, CEOs have the clarity they need to make correct decisions and achieve even the most ambitious outcomes.

## RESOLUTION

**"Adventum's sophisticated modeling allowed us to focus on core business strategy."**

- Robert Sofia, Snappy Kraken CEO

- Adventum's service depth and quick turnaround enabled the team to take mental and tactical ownership, freeing the CEO to work business tactics and long-term strategy.
- Financial modeling enhanced clarity, and helped the company to prepare detailed financial reports, and an accurate range of scenarios for presentation to the board.

## Transparency Drives Investment

Monetary, as you'd expect – but personal investment as well. Snappy Kraken's financial modeling drove both stakeholder alignment and a mutual vision for future growth.

## ACTIONS

01

Adventum's financial planning and analysis allowed their CEO to focus his attention on honing business strategy.

02

Sophisticated modeling prepared Snappy Kraken for investor inquiries and stakeholder scrutiny.

03

Financial reports, dashboards, and multiple scenario analyses put accurate projections before the board.

04

Armed with a solid business plan backed by detailed projections, Snappy Kraken is now prepared for future series funding.