



CASE STUDY

HOW **ADVISOR LEGACY** ACCELERATED VISIBILITY,
PIPELINE GROWTH, AND REVENUE OPERATIONS



THE CHALLENGE

As Advisor Legacy continued to grow, the company needed a more scalable foundation for marketing, revenue operations, lead generation, and digital visibility. Internal resources were stretched across multiple functions, making it difficult to support growth initiatives efficiently. The company needed stronger operational infrastructure, improved online visibility, a more modern digital presence, and a scalable system for generating consistent sales conversations with qualified advisory firms.

01 Low Brand Visibility

02 Inconsistent Lead Flow

03 Lack of Scalable Marketing Engine

THE SOLUTION

SmithDigital partnered with Advisor Legacy to build a more integrated growth and revenue operations system designed to support scalability across marketing, sales, and business development initiatives.

The engagement included modernization of the company's website and digital presence, expanded SEO and AI discoverability initiatives, HubSpot optimization, outbound business development support, reporting automation, and ongoing operational improvements designed to create better alignment between sales and marketing activities.

SmithDigital also supported Advisor Legacy with dedicated resources across revenue operations, outbound prospecting, website development, content distribution, and digital visibility initiatives. By combining these functions into a unified growth strategy, Advisor Legacy was able to improve operational efficiency while expanding sales and marketing capacity without building a large internal team.

"The team is fantastic, bringing together a wide range of skills. They respond quickly and on time, and it's always a pleasure to work with them. I've entrusted all of our digital marketing needs to Smith Digital. They built an impressive website for us, continue to manage our HubSpot instance, and we also make use of their turnkey BDR service."

- Founder | Advisor Legacy

THE RESULTS



Increased Visibility
Significant growth in organic search rankings and branded visibility.



Consistent Lead Generation
Steady flow of qualified leads from inbound marketing and content.



Marketing Automation
HubSpot implementation streamlined processes, nurturing, and tracking.



Stronger Growth Foundation
A scalable marketing engine that supports long-term business growth.

KEY TAKEAWAYS

- ✔ Strong content and SEO drive awareness and build credibility.
- ✔ Inbound marketing creates predictable pipeline of qualified leads.
- ✔ Automation and alignment improve efficiency and increase conversions.
- ✔ A scalable system lays the foundation of sustainable business growth.