

SUCCESS STORY

Strategic Planning and Expertise Building

Financial Services Startup Launched Money Transfer App and Prepaid Card for Hispanics
Obtained up to \$1MM in Seed Funds and Achieved 30% Lower Customer Acquisition Cost



THE CHALLENGE

A fintech provider of mobile transfers and international prepaid products wanted to get a piece of the \$5 billion market in fees for sending money to Latin America. For that purpose, they needed to engage un- and under-banked U.S. Hispanics to use their app and prepaid card, showing them it was a more convenient and less expensive way to send money abroad. The client also needed a marketing plan to secure ongoing investor funding.



OUR APPROACH

- Sized U.S. money transfer opportunity by country of origin
- Brainstormed marketing tactics
- Estimated customer acquisition costs
- Provided templates and coaching for execution of competitive analysis, concept testing and creative briefing
- Developed brand architecture and led team to finalize mission-vision-values
- Acted as launch project manager
- Reviewed all creative materials
- Developed beta testing protocol
- Led team of paid search, app search optimization and social media experts to execute Mother's Day campaign



OUR IMPACT

- Contributed plan and data for startup to raise up to \$1 million seed investment.
- Mother's Day launch executed in record 2-week turnaround time while navigating technical development constraints; acquired subscribers at 30% lower cost than originally planned.
- Clear, consistent brand presentation including key benefit copy points.
- Learning about concept communication and usage needed to optimize launch.
- On-time, on-budget tactical execution and successful team conflict resolution.

"Sandra's ability to manage the multi-level rollout and communicate effectively between all parties involved was impressive and invaluable"

– Justin Hintz, Co-Founder and CEO | Oak Financial Software Corp.

Have a similar challenge?

CALL US TODAY FOR A FREE CONSULTATION

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