

# Creating & implementing a comprehensive online advertising program for Simplify ETFs

## Services Provided

Digital media strategy and planning



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## The Story

Founded in 2020, Simplify Asset Management was created to help financial advisors modernize the traditional 60/40 portfolio. From finding income in low-yield environments, to managing portfolio risk in stressful equity markets, Simplify's ETF solutions have garnered attention for their use of institutional investment strategies built for the specific outcomes advisors demand.

With the initial launch of a suite of ETFs (including SPD - Simplify US Equity PLUS Downside Convexity ETF) and more launches on the way, Simplify decided to work with Canspan BMG to deploy advanced digital advertising tactics aimed at promoting their ETFs, and growing the Simplify brand.

"Canspan BMG has earned the trust of our executive and marketing teams. They've shown a level of expertise across all platforms that we had trouble finding elsewhere, and we rely on them to always find a way to meet our objectives. Campaign performance, budget management, communication, and insights delivered by Riley and his team have been exceptional."



**David Berns**

CIO & Co-founder

Simplify Asset Management

The Results

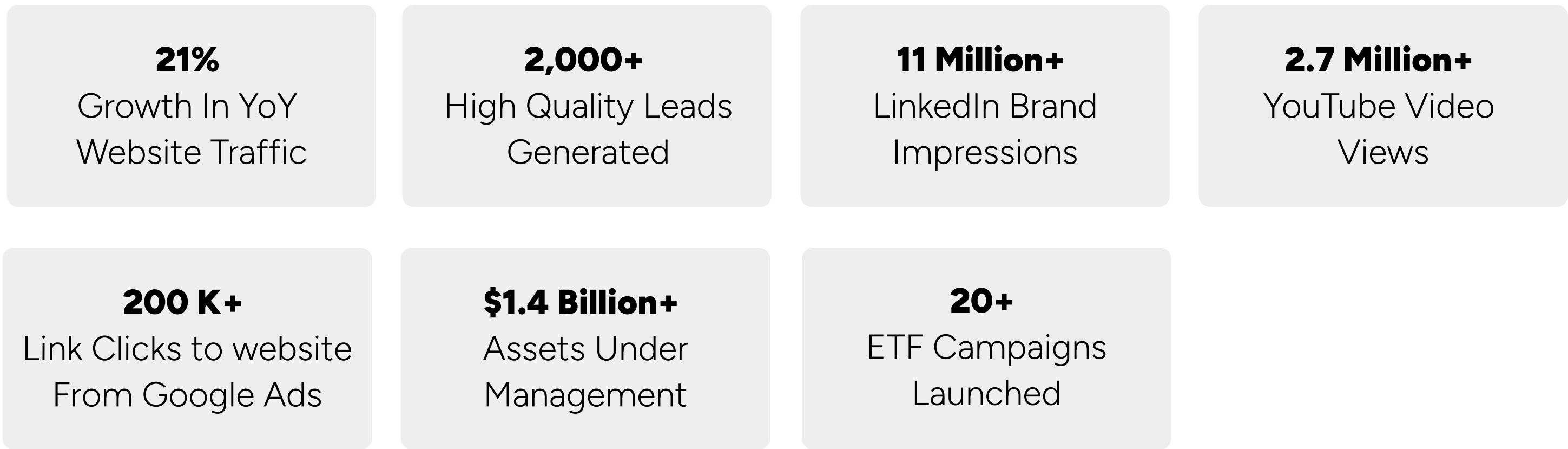
Immediately after beginning their partnership with Simplify, Canspan BMG was tasked with revamping a paid media strategy from a previous agency for a suite of four specific ETFs. Within only one month, SEM results began to improve significantly.

Improvements after 4 weeks:



Since that point, Canspan BMG has led the charge on digital strategy for all subsequent ETF launches, branding campaigns, lead generation tactics, and more. Read on to learn about the strategy and tactics used to achieve these results.

Performance Highlights



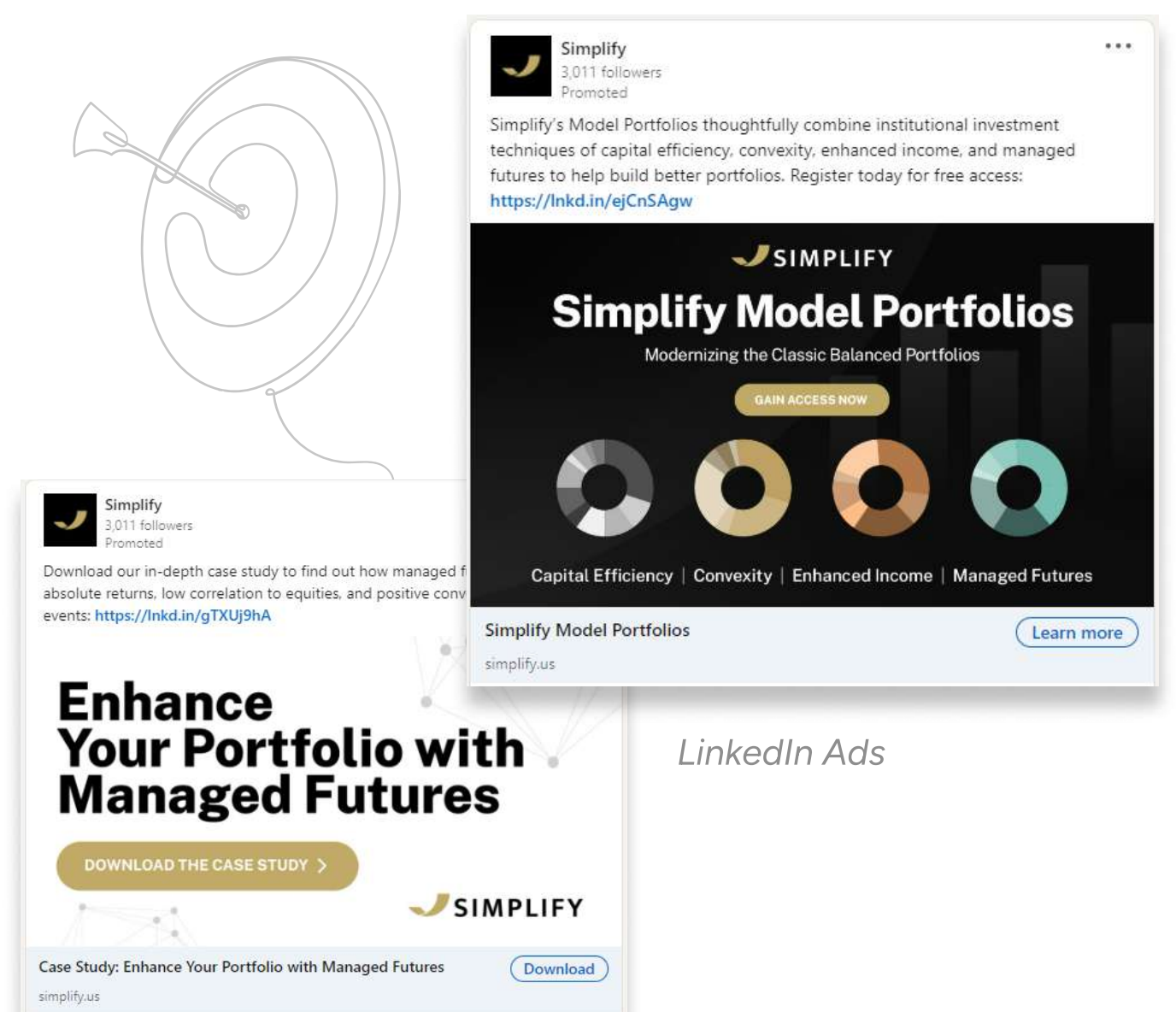
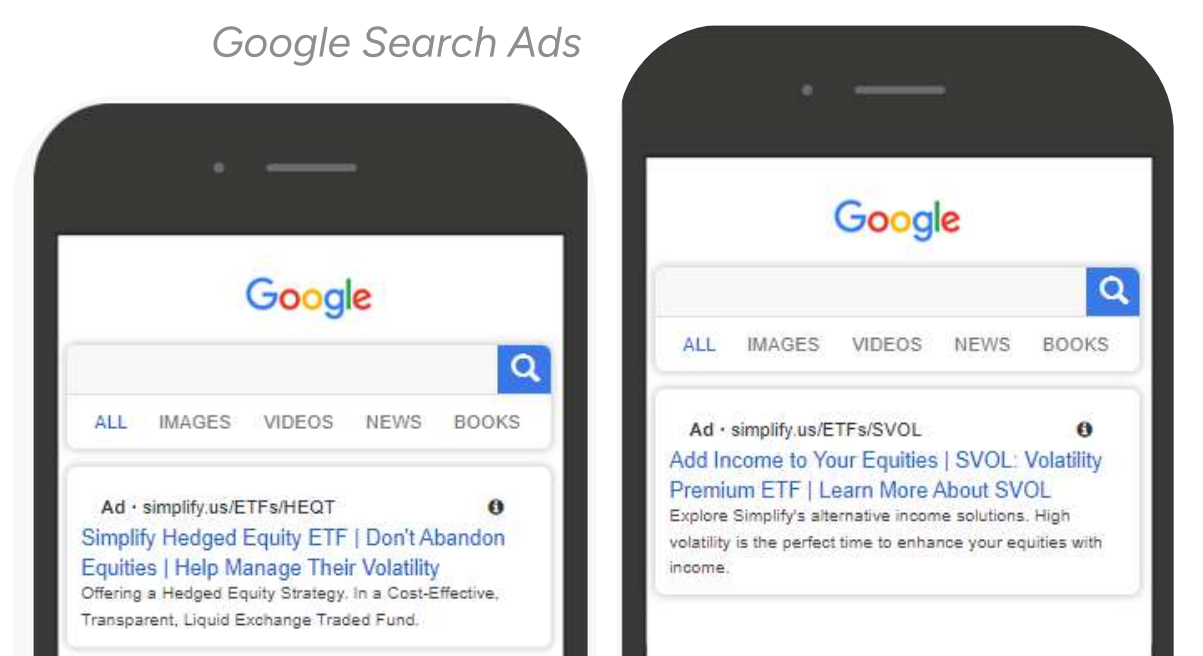


## The Strategy

Canspan BMG took charge of developing a comprehensive strategy and paid media plan for Simplify, including a range of ad platforms that included ETF-specific campaigns, and evergreen/brand campaigns. Remaining compliant with financial regulations in regards to ad copy/creative, and ad platform-specific policies was vital (ex: especially when promoting Bitcoin-related ETFs such as SPBC), and remains vital to executing the plan effectively without any snags.

Google Search advertising was a prominent part of the media mix, being a key intent-based channel where Simplify can reach people actively searching for relevant investing strategies, certain types of ETFs (ex: Income ETFs), and competing ETF Tickers. Canspan BMG built a unique SEM campaign template with Simplify that could be replicated & customized for future ETF launches. More advanced campaign optimization strategies were used to go beyond impressions and clicks, identifying & tracking noteworthy website behavior indicating ETF interest/intent. By implementing these strategies, campaigns have been structured towards generating action (investment), as opposed to just maximizing impressions and traffic. Microsoft Search Advertising on the Bing Network was later launched as well, using learnings from Google, in order to reach additional relevant audiences and take advantage of the lower CPCs on Bing.

While SEM tactics have been intent-based in nature, the LinkedIn Advertising strategy was centered around audience-targeting to reach various market segments within the Financial Professionals field. Sophisticated audience layered techniques in campaigns (using Job Titles, Functions, Professional Skills, Groups etc.) have been used to ensure the right audiences are being reached. In addition to ETF-specific campaigns, LinkedIn has proven to be a major lead generation tool by leveraging Simplify's thought-leadership assets (ex: case studies, Advisor Hub tools) to bring in Financial Professionals to the Simplify CRM platform where leads could be further nurtured.





The Strategy (contd)

Additional higher-funnel tactics such as YouTube advertising have also been launched to help grow brand awareness and amplify select ETFs, using a combination of contextual targeting & audience targeting to serve TrueView video ads. View Rates in TrueView campaigns have consistently been well above YouTube benchmarks (50%+) indicating strong audience targeting and engaging video creative.

Conclusion

Through changing objectives and priorities, Simplify continues to rely on Canspan BMG’s media planning and in-depth analysis of their multi-channel advertising program. The agency’s role includes proactively offering insight and recommendations for optimizations. These updates are generally quickly approved and implemented. After two years working together, a seamless and productive partnership has materialized. Simplify continues to grow their AUM, investor base, and product offering - all supported by the agency’s innovative and cost effective marketing.



YouTube Advertising



Google Display Ad



CEO Paul Kim and Members of the Simplify Team  
Ring the Opening Bell at the NYSE

