

## The AcornOak Team

Let AcornOak be your one-stop outsourced marketing and business partner.

Our name says it all – we’re about helping our clients grow through business strategy, brand awareness, lead generation and creativity and innovation.

*AcornOak: Your Best Resource for Marketing Expertise*

Powered by AI technology, we offer organizations a bundle of services specifically designed to expand their share of the affluent market with a micro-niche focus of a granular audience targeting not possible with typical lists or LinkedIn.

**3 Month Package: Fee is \$13,000/month**

### MEET OUR TEAM OF EXPERTS



**Virginia Glaenzer**

Digital expert  
Marketing strategist  
Content writer  
Sales funnel creator  
Conference speaker



**Lori Schwebel**

Marketing strategist  
Product launch expert  
Content writer  
Event coordinator



**Sharon Lewis**

Marketing strategist  
Marketing researcher  
Brand strategist  
Go-to-market strategist  
Content writer



**Tracey McArdle**

Marketing strategist  
Sales strategist  
Public relations  
Advertising  
Market research  
Event coordinator



**Leslie Cohen**

Product development  
Business developer  
Business strategist  
COO executive  
Advisory Specialist



**Emily Klein**

Business strategist  
Digital Marketer  
Author/writer  
Executive coach  
Business developer



**Anna Seroff**

Digital Marketer  
Data researcher  
Creative writer  
Visual communicator



**Robbi Muir**

Graphic designer  
Brand strategist  
Creative art director  
Marketing designer  
Artist/painter



**Yuraimi Abreu**

Digital marketer  
Integrated marketing specialist  
Business consultant  
AdTech consultant

## A Focused Approach

TO A CHALLENGING MARKET

*Our current noisy and competitive market creates barriers to building new relationships and introducing products.*

## Powered by Technology

WITH A GROWTH HACKING MINDSET

Using cutting-edge technology and a growth hacking mindset, our team finds specific "pockets" of high net worth individuals and identifies affluents who reject traditional sales techniques. Our team listens to their online conversations and finds opportunities to build relationships. This efficient system is designed to improve advisors' ability to move qualified leads through the sales funnel toward conversion. In addition to primary market research, we provide a deep understanding of how to position product offerings to create relevancy and relatability.

## The AcornOak Process

We begin by defining the audience your organization wants to serve and identifying key challenges that we later address in primary market research to uncover market opportunities. Our weekly social intelligence email, including calls to action using trigger events (conferences, job changes, etc.) and key topics, results in higher levels of engagement. Audience highlights and competitive information allows your sales team to focus on relationships, while supporting your organization with insights based on the activities of key influencers in your target market.

## Our team delivers

TANGIBLE INSIGHTS AND QUANTIFIED OUTCOMES

### Audience Report



A social intelligence primary market research report is compiled to reveal your audience persona and better position your brand to target this audience with actionable, relationship-building opportunities for your sales teams.

### Custom Social Profiles & Tribes



We assess five of your sales team member social profiles, make recommendations for improvements, and pinpoint their tribes to increase conversion rates.

### 1,000 Curated Prospects



Using AI, a list with 1,000 names of high net worth prospects is curated using a micro-niche focus with a granular audience targeting not possible with typical lists or LinkedIn.

### Weekly Social Intelligence



We supply weekly insights and social intelligence about your prospects' real-time social activities with our AI/machine learning algorithm.