

RULE

A photograph of two men in a meeting, with the word 'RULE' overlaid in large white letters. The image has a teal tint. The man on the right is older, with grey hair, wearing a light-colored button-down shirt, and is smiling while looking at a laptop. The man on the left is younger, seen in profile, looking at the same laptop. A water bottle is on the table. The background is blurred, showing what appears to be a window or a wall with some papers.

RULE

How we pivoted a live event to be fully virtual **during a pandemic**; successfully increasing revenue by **77% YoY** in 2020.

About Rule #1 Investing:

A financial and investing education company focused on teaching individuals how to invest their money based on value investing principles. Rule #1 Investing is dedicated to helping families and individuals achieve their financial freedom.

The Goal:

Pivoting monthly live workshops into virtual events in order to adapt to conditions due to the COVID-19 outbreak.

Industry Type:

Finance

Business Type:

Investing Education

Specifications:

IBM, Rumbletalk, Webmail, Zoho, Internal CRM, and Wordpress, Zoom

Services:

- Marketing / Funnel Strategy
- Sales
- Consulting
- Art Direction, Branding, UX/UI
- Front / Backend Development
- Video Production, Youtube
- SEO / CRO
- Content Marketing
- Paid Ads
- Social Media
- Email



Our Approach:

Due to uncertainty and concerns over the COVID-19 pandemic in 2020, we aimed to pivot our approach toward Rule #1's live events by transitioning the workshop to be a full virtual workshop experience.

This approach offered all of the same high-quality content and information audiences would have received from a live experience, and made available to audiences from the comfort of the viewer's home.

This was implemented through overhauling the sales page, customizing the email journey sequence, adding chat bots, and revamping content and paid media strategy.

[illegible]

----- Forwarded message -----
From: Rule #1 Investing <info@ruleoneinvesting.net>
Date: Thu, Apr 1, 2021 at 11:59 AM
Subject: The financial decisions you make in your 40s.
To: <and@brandtize.com>

Andrea

Have you noticed that after you turn 40 your feelings toward your finances start to change?

Unnecessary splurges become less enticing, and you start thinking more about the future.

The phase of life you're in now is crucial... you're at an age where **the decisions you make today** will affect how your retirement is and even when you get to retire.

Look, I know you've heard it all when it comes to retirement planning before and you've probably been contributing to your company's 401K plan for most of your adult life.

But I'm here to tell you that **those things aren't enough.**

If you want to be able to travel, retire on time (or even earlier than planned), and live a comfortable lifestyle, then you need to make a change.

I have a workshop that's designed to help people like you get the freedom they need for their retirement.

It's three full days taught completely online so you can attend from home office, your couch, a coffee shop — wherever. It will show you how to invest with certainty so you can stop worrying whether or not you'll have

I came from a blue-collar family where no one invested their money, so I understand how different and scary this may sound.

But investing doesn't have to be intimidating. Having the right set of rules and guidelines to follow actually makes it really simple — you just have to know what they are.

You don't need to work in finance or even keep up with stock market

Master the Market **from Your Home**

Learn how to start investing and manage your portfolio wisely in a volatile market.

Virtual Investing Workshops: April 16 - 18

I'm Ready to Invest

ABC NEWS CNN THE WALL STREET JOURNAL PBS FOX BUSINESS The New York Times CNBC

RULE

Results:

Having delivered a 3-day hands-on investing education to more than 4,000 students throughout 2020, the new promotion strategy and website optimizations increased traffic to the web page by 20% YoY and ultimately lead to a 95% increase in event attendees YoY

95%

Increase in event attendees

77%

Increase in gross revenue YoY

96%

Attendance rate

86%

NPS score

548%

Return on ad spend (ROAS)

90 hrs

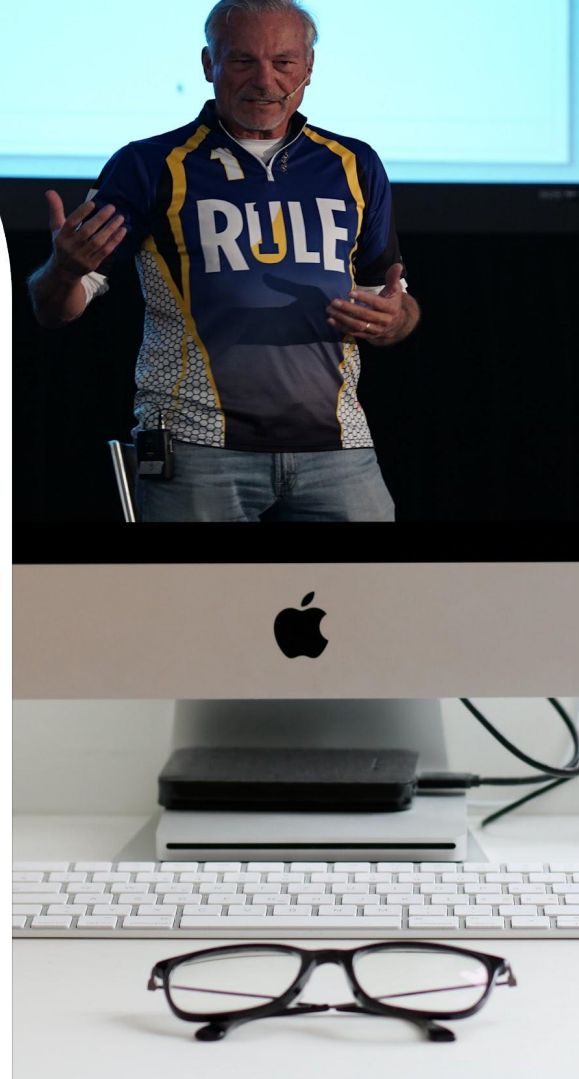
From start of sale to sold out

RULE

Where there are problems, our team has **innovative solutions** just for you.

Our Solution:

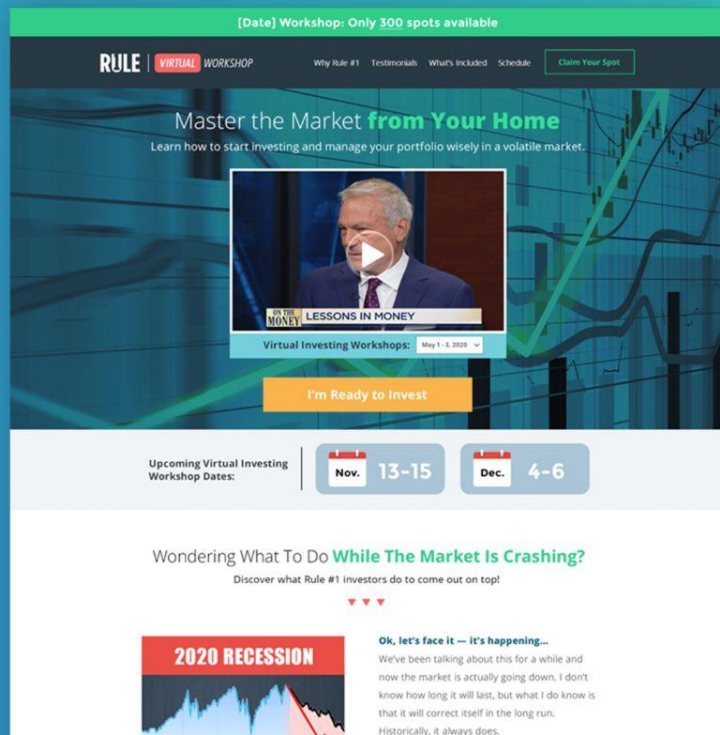
The results overall attracted new leads into the funnel and ensured event success for Rule #1 in 2021. To see how we accomplished this, take a closer look into the optimizations we made to help increase traffic to the website that ultimately lead to more sign ups to the virtual event.



RULE

Conducted an A/B test of the main sales page that performed stably at a **3.5% conversion rate**.

A/B Test Page 1:



[Date] Workshop: Only 300 spots available

RULE | VIRTUAL WORKSHOP

Why Rule #1 | Testimonials | What's Included | Schedule | Claim Your Spot

Master the Market **from Your Home**

Learn how to start investing and manage your portfolio wisely in a volatile market.

LESSONS IN MONEY

Virtual Investing Workshops: May 1 - 8, 2020

I'm Ready to Invest

Upcoming Virtual Investing Workshop Dates:

Nov. 13-15 | Dec. 4-6

Wondering What To Do **While The Market Is Crashing?**

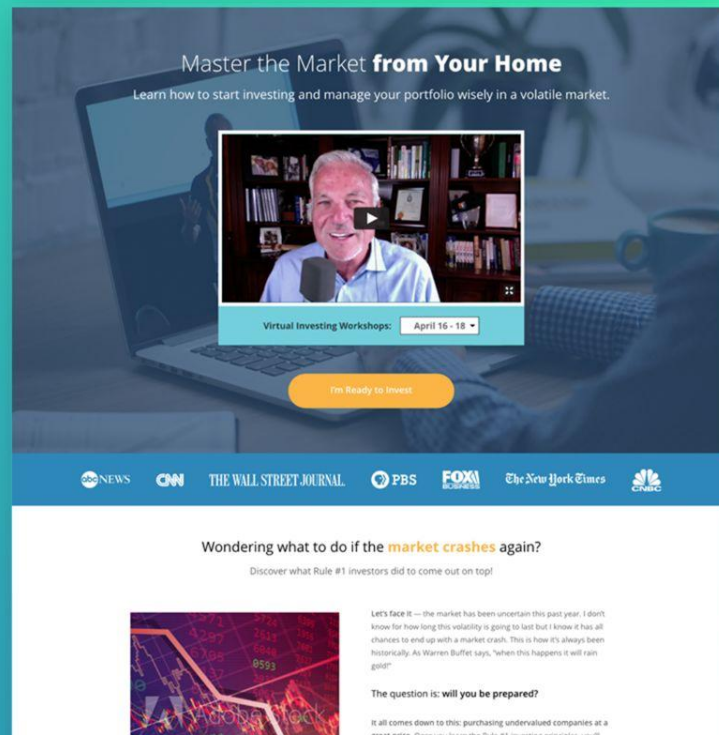
Discover what Rule #1 investors do to come out on top!

2020 RECESSION

Ok, let's face it — it's happening...

We've been talking about this for a while and now the market is actually going down. I don't know how long it will last, but what I do know is that it will correct itself in the long run. Historically, it always does.

A/B Test Page 2:



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Virtual Investing Workshops: April 16 - 18

I'm Ready to Invest

abc NEWS | CNN | THE WALL STREET JOURNAL | PBS | FOX | The New York Times | CNBC

Wondering what to do if the **market crashes** again?

Discover what Rule #1 investors did to come out on top!

Let's face it — the market has been uncertain this past year. I don't know for how long this volatility is going to last but I know it has all chances to end up with a market crash. This is how it's always been historically. As Warren Buffet says, "when this happens it will rain gold!"

The question is: will you be prepared?

It all comes down to this: purchasing undervalued companies at a

RULE

Revamped & republished
several top trafficked
blogs that grew organic
subscribers by **76%.**

Small with L

Phil Town

While invest
money, that
every size ba
or as much a

Everyone ne
journey, it's a

When it com
you through
investments

With the i



Investing for Beginners: Get Started Investing with These 10 Steps

Phil Town 5 comments.

Getting started investing when you're a beginner can be plenty intimidating at first.

The learning curve combined with the fact that you are putting your own money at risk is often enough to scare many average people away from one of the safest ways to financial freedom.

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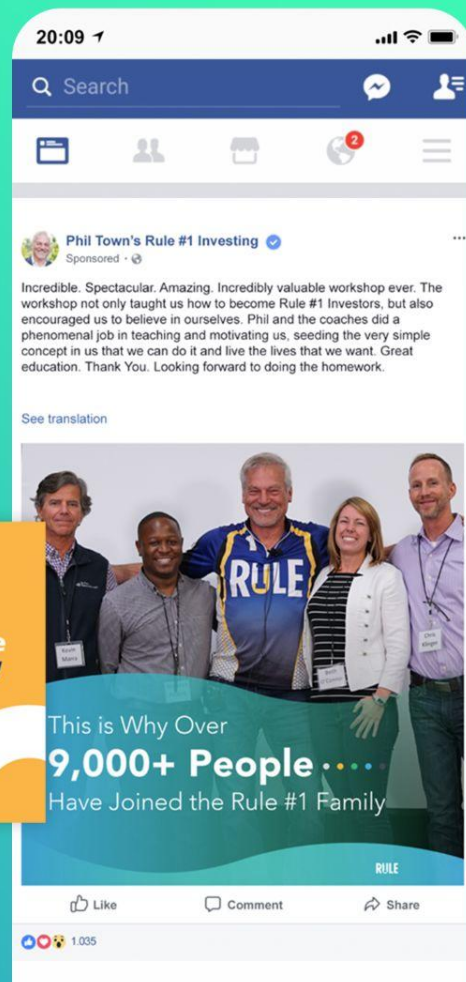
[Step 4: Utilize Investing Resources for Beginners](#)

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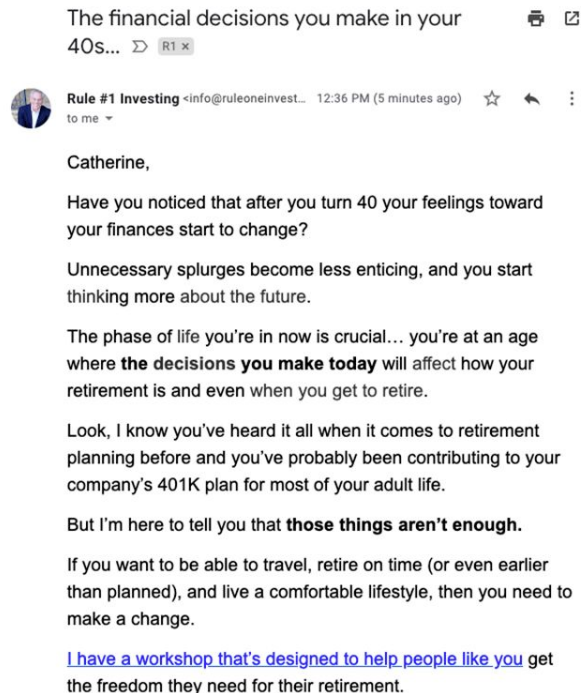
RULE

Saw growth in attributed net revenue by **53% YoY** by fine-tuning Google and Facebook ads.



RULE

New promotional strategy and email list segmentation efforts decreased unsubscribe rates by **15% YoY** and increased sales by **100%.**



RULE

Set up the full infrastructure of a recurring virtual event that has more than **100 coaches** and **10 live speakers**, all trained by our internal team.



🕒 Rule 1 Student Question

How should I be investing for retirement?



RULE

“We’ve worked with other companies and had little to show for our investment. With Brandetize, it’s the opposite; **we’ve gotten back a huge return on our marketing investment with them, doubling our revenue twice in five years.**”

— Phil Town

Founder, Rule #1 Investing, 3X New York Times Bestselling Author

