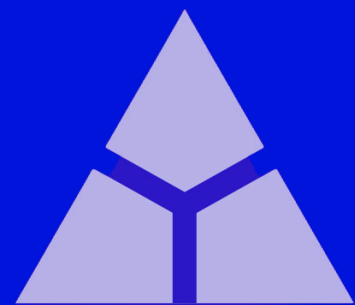


# POEM PLANNING 2025

PRESENTED BY  
**DAN HILLS**



GALAXY SOFTWARE

## GALAXY SOFTWARE INC.

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- 01 INTRODUCTION
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# WHY GALAXY SOFTWARE?

## Low-Latency Execution with Real-Time Insights:

Allows investors to execute trades within milliseconds, a critical advantage for opportunities in fast-moving markets.

HNW investor Sarah capitalized on geopolitical news by using Galaxy's tools to make timely trades, netting a 10% return in three months.

## Growing Market Trends:

The global market for AI-powered wealth tools in HNW segments has shown a CAGR of 14%, indicating robust growth opportunities for companies like Galaxy Software.

Impact: A targeted focus on these groups can generate exponential returns by fostering high client retention rates and premium pricing models..

## Simplifying Complexity with AI:

HNW and UHNW individuals often grapple with overwhelming data flows.

AI simplifies this complexity by delivering clarified insights and actionable trends in an instant.

## Adaptive News-Driven Trading Algorithms:

Value: Leverages real-time insights from 12 financial news feeds, recalibrating trading strategies automatically.

Use Case: An UHNW hedge fund manager optimized their \$10M equity portfolio through news-driven sentiment analysis, gaining a competitive edge during market volatility.

## White-Glove Support and Onboarding:

Value: Offers concierge-style onboarding for UHNW investors, ensuring their specific needs are understood and addressed.

Sales point: Network with Use Case: An UHNW entrepreneur adopted Galaxy Software after a bespoke consultation highlighted tailored algorithms for high-frequency trades.

# AUDIENCE

Using an abundance of data, we are able to understand our audience motivations, and through segmentation of the audience based on demographics, interests, and behaviors, we can tailor messaging to resonate with each segment. In this section, we look at the audience.



**GALAXY SOFTWARE**

# AUDIENCE

## Demographic

25-55, with a significant portion being over 40  
M45 / F55

## Geographic

National UK  
Scope for local targeting  
International interest

## Contextual

In and amongst trading based content

## Behavioural

Understanding the traits of HNW audiences  
and their digital browsing habits

# Advanced Targeting

## Location:

UK - Postcode, county,  
TV region, Country  
US, Europe, Asia.



## Education:

Academic qualification  
Professional qualifications



## Socio- deographics

Family status,  
Married or Partnered  
Technology + Social Media



## Income

High - have >£1M in liquid  
assets



## Occupation

Professional  
+ £150K per year



## Data: 2PD + 3PD

Look-a-like audience  
profiles based on 1st party  
customer data, overlayed  
with targeting parameters  
allows the expansion of our  
communications to a wider  
audience



— and so what?

The granularity of data for superior  
insights + bespoke message  
tailoring = minimise on wastage

— But we need to simplify  
the complex into Personas  
for ease of understanding.



## Profile:

Age: 35

Occupation: Founder of a tech startup in Manchester  
Annual Income: £250,000+

Investment Portfolio: £500,000, allocated across stocks, crypto, and ETFs

## Motivations:

A trading tool that offers a competitive edge

Low-latency execution for milliseconds-level decision-making

Cutting-edge technology to complement their analytics-driven approach

## Barriers:

Frustration with outdated platforms or clunky user experiences

Alex has been actively trading for five years, juggling multiple trading platforms to manage their investments. Constant delays during periods of high market volatility led to missed opportunities and growing dissatisfaction. After discovering Galaxy Software through a peer recommendation, Alex attended a demo and was captivated by its seamless user experience and adaptive trading algorithms. Within three months, Alex integrated Galaxy Software into their routine. The platform's low-latency execution allowed them to close trades 20% faster, directly boosting their quarterly portfolio returns by 12%. Alex now frequently refers other tech-savvy peers to the platform.

Case Study

# 1. The Tech-Savvy Trader



## Profile:

Age: 67

Occupation: Retired accountant in Surrey  
Annual Income: £150,000 (pensions, rental income)  
Investment Portfolio: £3 million, focused on capital preservation

## Motivations:

Steady returns with minimal risk exposure

Transparent and reliable insights for cautious decision-making

## Barriers:

Wariness of unproven or overly complex platforms

Peter, a retired accountant, sought a secure way to manage his investments in an unpredictable financial climate. Galaxy Software appealed to him due to its clear visual dashboards and emphasis on risk management. After consulting with Galaxy's support team, Peter used their platform to monitor his portfolio and quickly rebalance assets when markets fluctuated. Over a year, Peter achieved a consistent 6% annual growth, matching his long-term financial goals without compromising his risk threshold.

Case Study

# 3. The Risk-Averse Optimiser



## Profile:

Age: 42

Occupation: Freelance creative director in London  
Annual Income: £200,000+  
Investment Portfolio: £400,000, guided by market trends

## Motivations:

Harnessing real-time insights for sentiment-driven decision-making  
Platforms that balance instinct and strategic support

## Barriers:

Skepticism of excessive automation or lack of user control

Chris built an instinctive trading approach over the years, informed by economic trends. However, the limitations of their current platform led to several missed opportunities. Galaxy Software's integration of real-time news and sentiment analysis was the perfect fit. Within weeks, Chris customized their dashboard to track high-impact market-breaking headlines. Using Galaxy's algorithms, Chris refined their trades to align with news sentiment and saw a 15% performance improvement compared to previous tools.

Case Study

# 5. The Sentiment-Driven Investor

# Bespoke Personas



## Profile:

Age: 45

Occupation: Owner of a luxury hospitality business in Bath  
Annual Income: £350,000+  
Investment Portfolio: £1 million, focused on diversification

## Motivations:

Stability and resilience in an unpredictable market

A user-friendly way to rebalance investments dynamically

## Barriers:

Initial skepticism about the complexity of adopting new technology

Ralph manages a boutique hotel, relying on a mix of property investments and equities for supplementary income. Seasonal income fluctuations led her to seek smarter tools for portfolio management. After registering for Galaxy Software's free trial, Emma explored its portfolio risk analysis tools, which helped her identify overexposure to volatile assets. With Galaxy's automated alerts, Emma shifted 40% of her portfolio to well-performing equities during a bond market downturn. Six months later, her portfolio exhibited 15% more resilience compared to her previous strategy. Emma now praises Galaxy for enabling her to weather market turbulence with confidence.

Case Study

# 2. The Diversifier



## Profile:

Age: 33

Occupation: Senior project manager in Bristol  
Annual Income: £120,000+  
Investment Portfolio: £100,000, primarily in index funds

## Motivations:

Aspiration to learn advanced trading strategies

A user-friendly interface with educational resources

## Barriers:

Hesitation caused by jargon-heavy and complex tools

Emily, a project manager with a growing interest in active trading, found traditional platforms intimidating. Galaxy Software's approachable educational webinars caught her attention. Within three months of using their step-by-step tutorials, Emily progressed from passive to active investing. She made her first series of trades during a volatile period, relying on Galaxy's news-driven insights to secure a 9% portfolio return within six months. Emily now confidently shares her progress with friends, crediting Galaxy's easy onboarding process.

Case Study

# 4. The Ambitious Newcomer



## Profile:

Age: 58

Occupation: Private equity partner in London  
Annual Income: £1 million+  
Investment Portfolio: £5 million+, actively managed

## Motivations:

Advanced, customizable trading solutions

Dedicated consultation services for personalized strategies

## Barriers:

Reluctance to switch from existing proprietary tools without added value

John, a veteran in private equity, relied heavily on his proprietary trading systems. When a peer recommended Galaxy Software, John explored its offerings through a tailored demo. The platform impressed him with its low-latency execution and advanced customization options. After engaging Galaxy's consultation team, John implemented a fully personalized setup, resulting in a 15% boost in annual returns. He now uses Galaxy to complement his proprietary tools, focusing on real-time adaptability during market shifts.

Case Study

# 6. The Seasoned Pro



# ADDRESSING THE BROAD AUDIENCE

We need an idea that can engage the broadest audience, in particular the 6 personas

## Cross-Platform, Cross-Format Cross-Audience IMC

(Integrated Marketing Communications)

### Tech-Savvy Trader

"Unlock the Power of AI-Driven Trading"

"Seamless Integration with Real-Time Analytics"

"Experience Low-Latency Execution"

### Luxury Lifestyle

"Safeguard Your Wealth with Galaxy Software"

"Experience Stability and Growth in an Unpredictable Market"

"Your Luxury Lifestyle Deserves the Best Investment Tools"

### Educational Webinar Series

"Master Advanced Trading Strategies with Galaxy Software"

"Join Our Free Educational Webinars"

"Elevate Your Investment Game"

The background is a solid blue color with a series of smooth, flowing, wavy lines that create a sense of movement and depth. The lines are lighter blue and appear to be glowing or reflecting light, giving the background a liquid or fabric-like texture. The word "CHANNELS" is written in a bold, white, sans-serif font, positioned in the lower-left quadrant of the image.

**CHANNELS**

**Awareness**

**Interest**

**Engagement**

**Sale**

**Loyalty**

**BROADCAST**

**TARGETTED  
REACH**

**POACHER  
GAMEKEEPER**



# CHANNEL STRATEGY

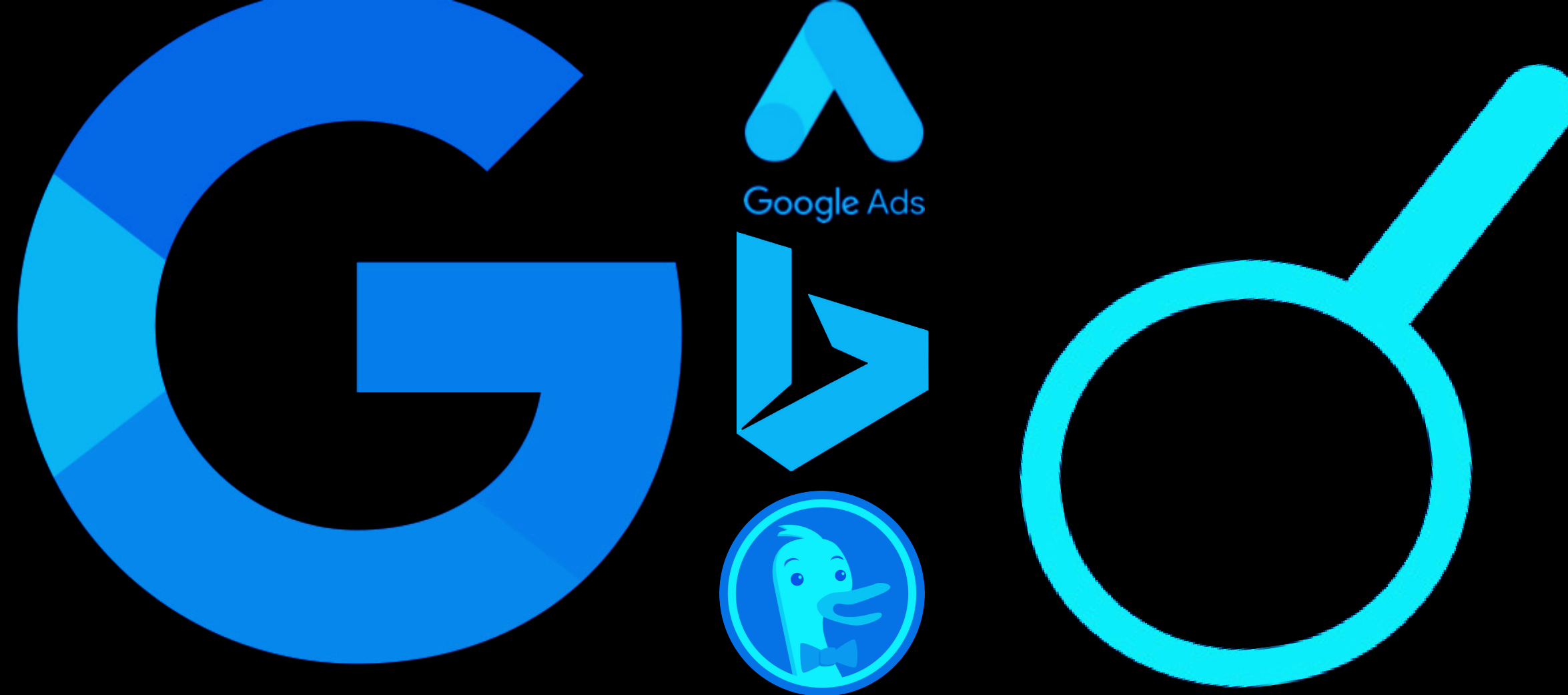
**Fill from the bottom of the funnel upwards:**

- Have bought before (loyalty)
- Are going to buy
- Have shown interest in our product by visiting our channels
- Have visited the category
- Don't know our brand, but fit the profile

## Media balance

**Higher the funnel, the more reach, the more wastage**

**Lower the funnel, the more effective, but the smaller the volume**



Exploit lifestyle based AI content request such as "michellin star resteraunts", "High-end fashion" "horse racing tipping" to expand audience reach



Utilise Performance Max to expand on search and userintent data

Leverage all search platforms to chase long tail seacrch volume

"Brand" search as a barometer for Awareness campaign effectiveness

# SEARCH



Demo  
Location  
Interest  
behaviour

multi  
layered  
targeting

Meta

f

Instagram

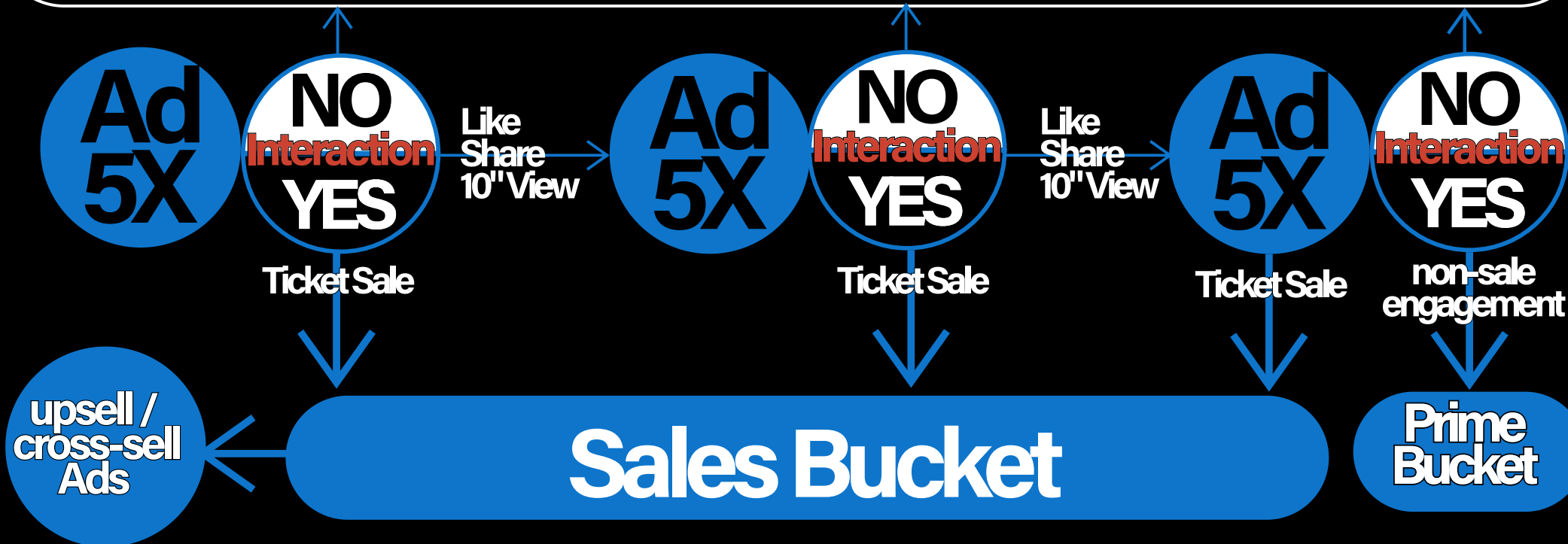
TikTok

Pinterest

B2B  
Strategy

LinkedIn ads

Sub-Prime Bucket

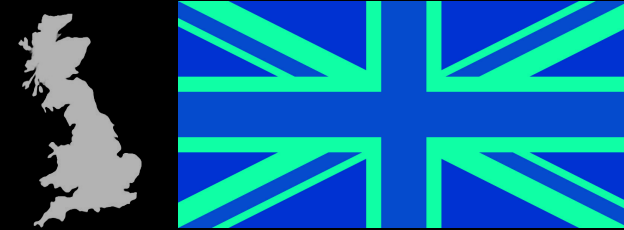


SOCCIAL

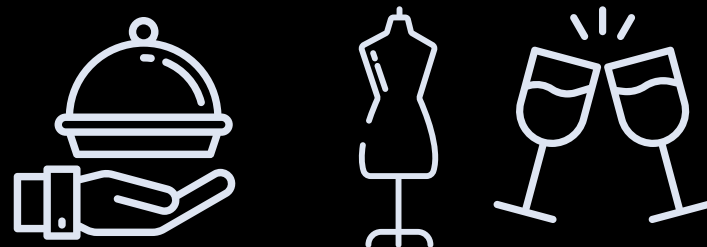
# DATA STRATEGY

Demographic ♀♂ 👤👤

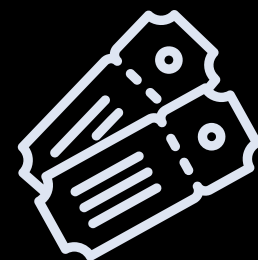
Geographic



Contextual



Behavioural



**DSP**  
Data Planning  
**MiQ**  
**scoota.**  
sky | ADSMART  
**dax**  
DIGITAL AD EXCHANGE

**ABM**  
Strategy  
Gatekeepers  
& Influencers  
**sense**  
accountinsight  
**cognism**  
DEMANDBASE

## Data Cleanrooms



# THE BIG IDEA

*Selecting one of the three ideas as our lead media. investing a significant sum of the media budget to produce content which can be used throughout the funnel*

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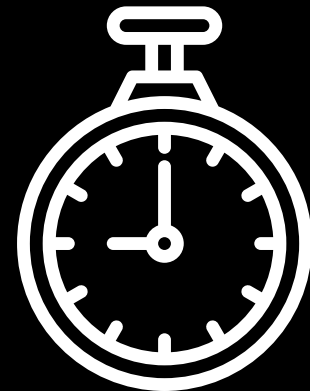


# INVESTMENT

**10** *REVOLUTION*

**20** *EVOLUTION*

**70%**  
*SOLUTION*  
+ *REVOLUTION*



**30%**  
*ESTABLISHMENT*

**70** *ESTABLISHMENT*



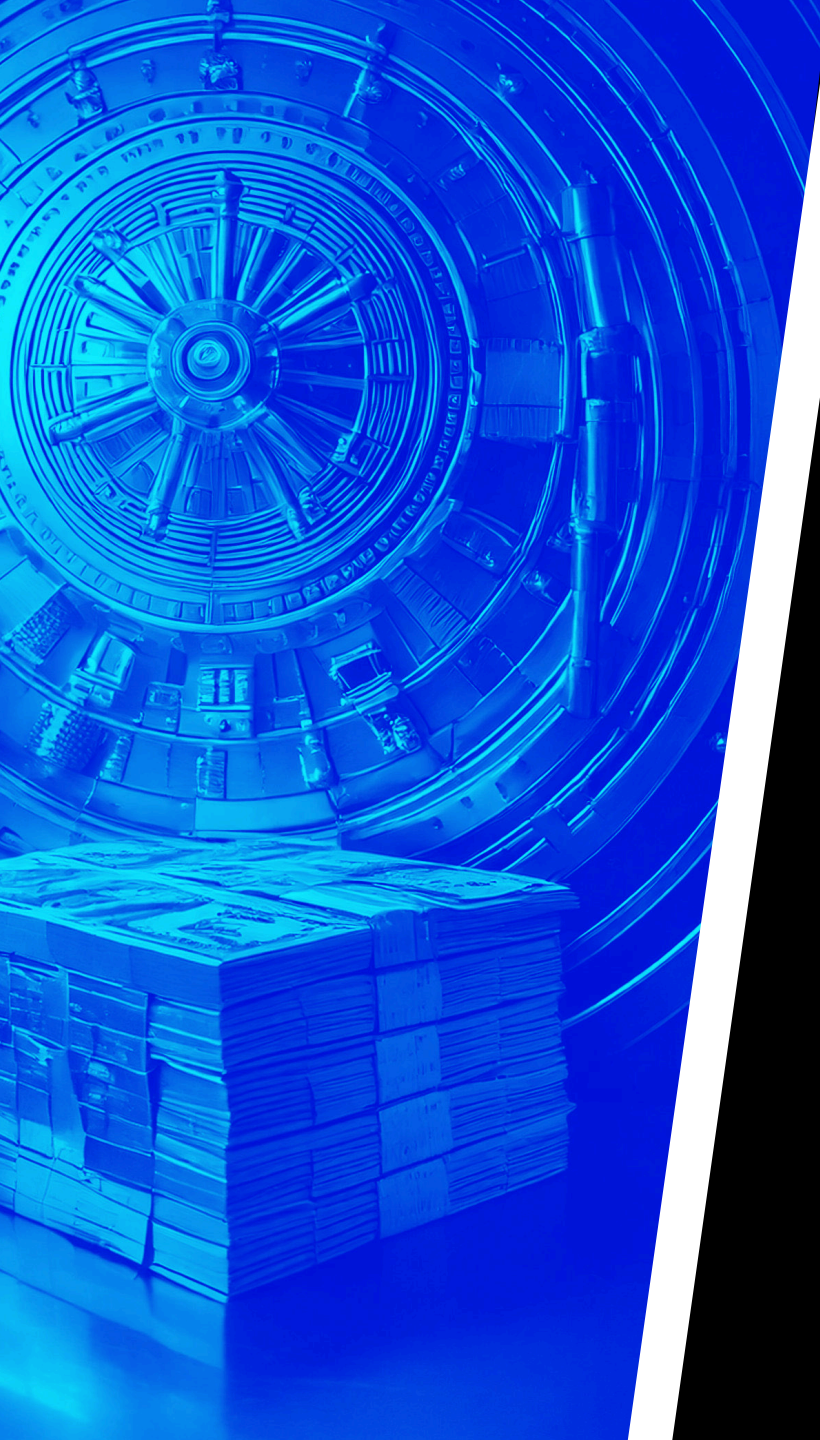
**PROVEN  
PERFORMANCE**

123  
abc **FORMATS**

 **CHANNELS**

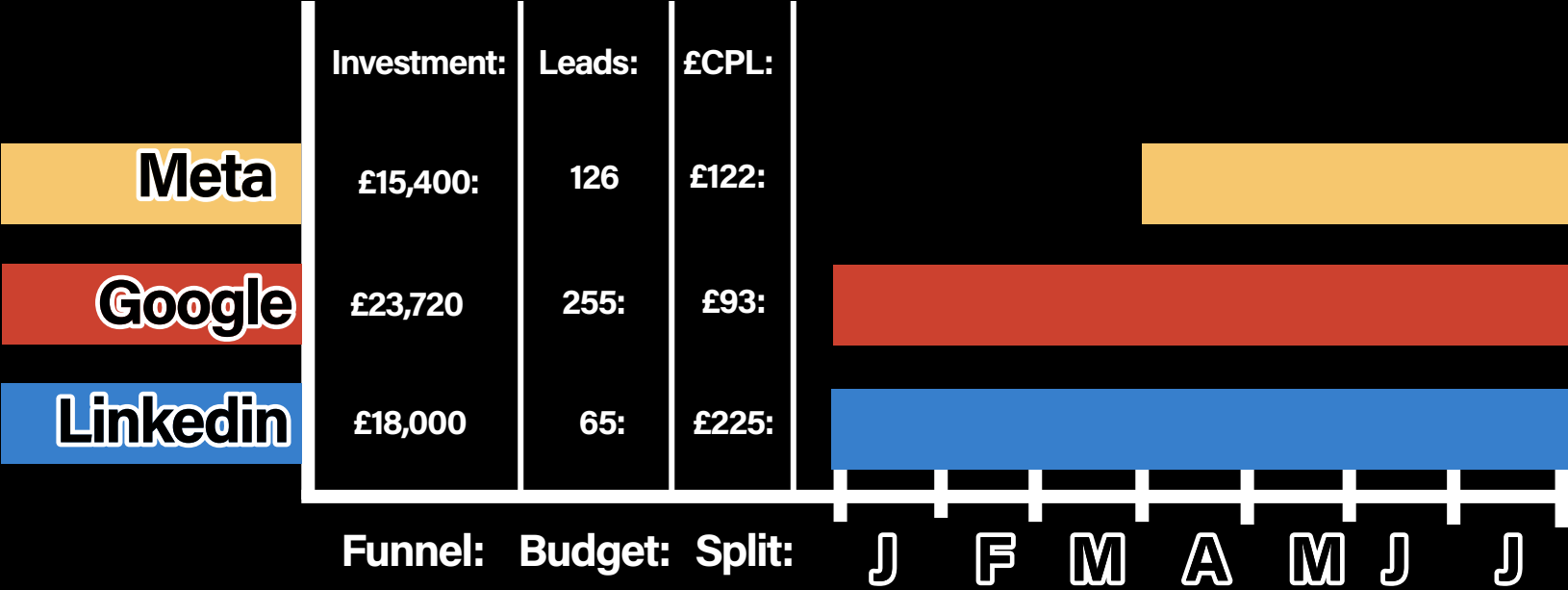
 **TARGETTING**

 **MESSAGING**



Budget: **\$1M**

# MEDIA PLAN



This topline media plan provides a detailed overview of our digital advertising strategy across Google, Meta, and LinkedIn. Each platform offers unique advantages, and our analysis reveals varying levels of effectiveness and cost-efficiency across different placements. By continuously monitoring and optimizing our campaigns based on real-time data, we can enhance engagement, drive higher conversion rates, and ultimately achieve better ROI. This plan serves as a foundation for future campaigns, allowing us to refine our strategies and adapt to the ever-evolving digital landscape. By leveraging these insights, we are well-positioned to achieve our marketing objectives and drive measurable growth for Galaxy Software.

# VALUE EXCHANGE

The need for a value exchange lies in creating a mutually beneficial relationship between the company and its audience. By offering valuable content, tools, or experiences, the company can attract and engage high-net-worth individuals, fostering trust and loyalty. In return, the company gains valuable data, leads, and potential customers, ultimately driving business growth and achieving marketing objectives.

## 1. EXCLUSIVE WEBINARS AND MASTERCLASS



Offer exclusive access to high-quality webinars and masterclasses on advanced trading strategies, market insights, and wealth management tips. These sessions can be hosted by industry experts and thought leaders.

## 2. PERSONALIZED INVESTMENT REPORTS



Offer personalized investment reports tailored to the individual's portfolio and investment goals. These reports can provide detailed analysis, performance metrics, and actionable recommendations.

## 3. INTERACTIVE INVESTMENT TOOLS



Develop and offer interactive investment tools such as risk assessment calculators, portfolio optimization simulators, and market trend analyzers. These tools can help users make informed decisions and enhance their investment strategies.

# COMBINED PERFORMANCE

	Investment	Impressions	Engagements	Leads	Sales
Linkedin	£18,000	900K	18K	65	3
Google	£23,720	1.5M	27K	255	13
Meta	\$15,400	3.5M	46.6K	126	6
Total	£57K	5.9M	92K	446	22

20:1  
Lead : Sale

£128  
per Lead

£2,560  
per Sale

Last click attribution model  
Planned on an even distribution split  
Estimated performance, based on  
proprietary data planning system\*

Is this model  
economically  
viable?

\*Relies on inventory availability + agile deployment and optimisation

4 WEEK CYCLE

# TEST, LEARN, REFINE, REPEAT

123  
abc

**FORMATS**

**CHANNELS**

**TARGETTING**

**MESSAGING**



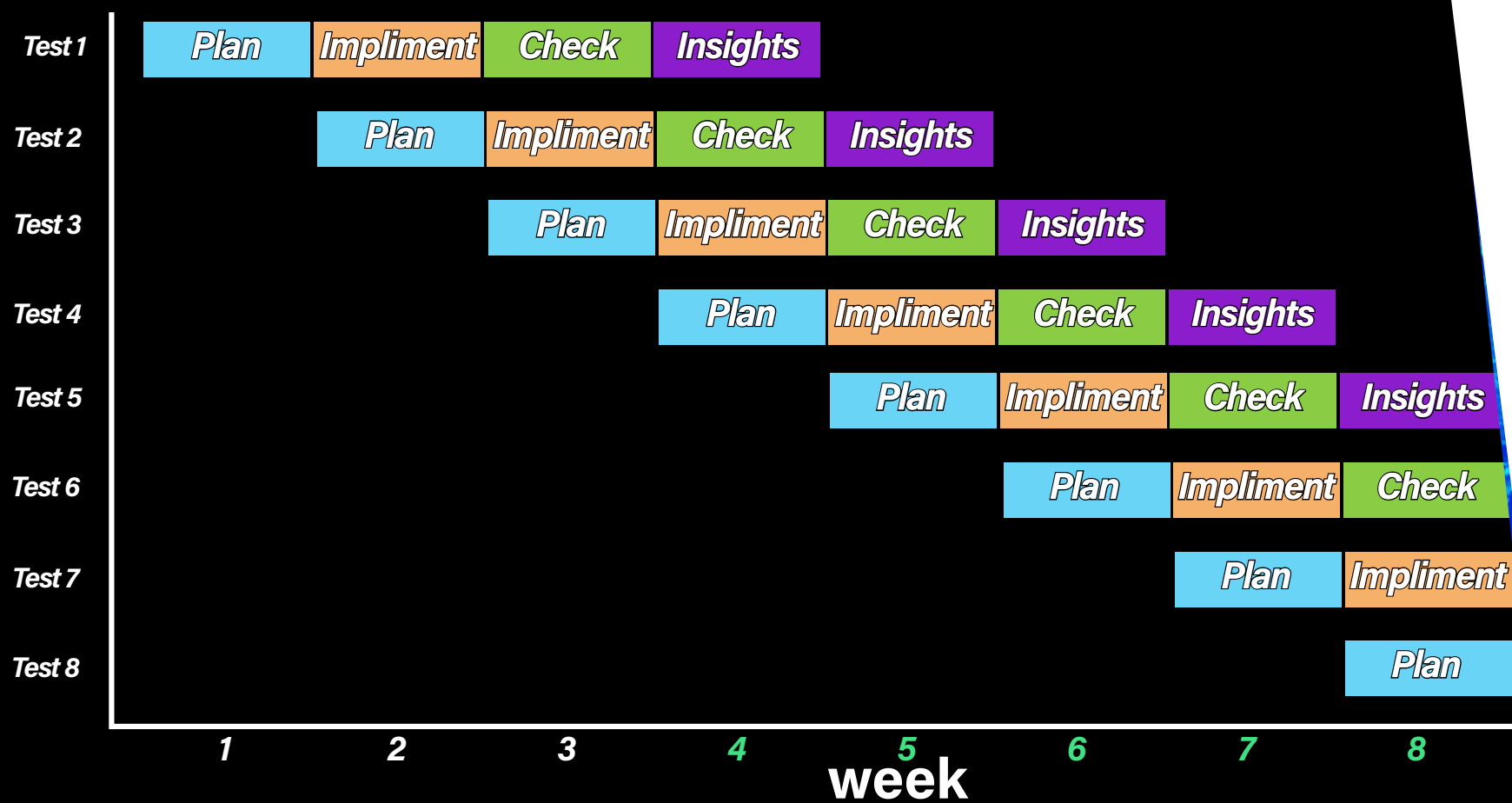
## Perpetual testing

Establish a hypothesis - "£ works better than % when selling"

**What are we testing?**

**Why are we testing that?**

What will the outcome mean?



# THANK YOU

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