



THE it CROWD
A FULL SERVICE MARKETING AGENCY



CASE STUDY

Ascent

Client Name: Ascent Business Systems

Industry: Field-service & construction operations software (Sage 100-integrated)

Client Since: May 29, 2025 – Q4 2025 (Phase 1)

Services Provided: Brand guidelines (Ascent and SVCONTHEGO), email marketing programs, copywriting and motion design, website content updates, social/LinkedIn support, sales enablement and partner campaigns

THE OBJECTIVES

Objective 1: Present a unified brand system for Ascent and SVCONTHEGO.

Objective 2: Launch multi-track email and content programs that improve deliverability and engagement.

Objective 3: Educate customers on automated texting to reduce no-shows and speed follow-ups.

Objective 4: Re-activate past prospects and enable Sage 100 partners with tailored messages and creative.

Objective 5: Support sales with simple, proof-first visuals and consistent website content.

THE CHALLENGE

Ascent wanted to communicate a clear, honest value story in a crowded software category while driving adoption of a new automated customer-texting capability. The team also needed outreach that re-engaged past prospects, equipped Sage 100 partners, and spoke to key trades (HVAC/Mechanical/Plumbing/Electrical). Internally, assets and lists required structure and a steady publishing rhythm.

APPROACH



1. Discovery and Analysis

- We held a kickoff on May 29, 2025, reviewed Mailchimp access, website CMS (Wix), contact lists, and LinkedIn channels, and aligned on weekly touchpoints. We audited list health, recent campaigns, and creative inventory. We identified five gaps: fragmented assets, under-explained features, fear of change in buying cycles, limited vertical and partner variants, and no simple reporting rhythm tied to pipeline questions.



2. Strategy & Development

- We built an honesty-first narrative (“proof over promises”) and a calendar that balanced product education with outcome stories. We created two brand guides (Ascent and SVCONTHEGO) for colors, type, and usage. We structured outreach into four tracks: (1) existing customers—feature adoption, (2) past prospects—“change without chaos,” (3) service-industry variants, and (4) Sage 100 partner enablement. Each track received motion headers, split-screen visuals, and concise copy designed to be easy to scan and easy to act on.

IMPLEMENTATION

1

Brand System & Creative Toolkit

- Delivered brand guidelines for Ascent and SVCONTHEGO and a library of motion assets (animated headers, “competitor vs. Ascent” split GIFs, workflow and mobile status visuals).
- Standardized alt text and file naming to support accessibility and reuse.
- **Challenge:** visual consistency across two brands.
- **Solution:** locked color and type tokens, reusable layout patterns, and a shared asset folder structure.

2

Email Marketing Programs

- **June Newsletter (Feature Education):** Introduced Automated Customer Service Texting—status-triggered messages (confirm, on-the-way, arrival, complete, survey), included with OSP Mobile 2.0, with simple setup through Vonage. Added a short compliance checklist and a “book a walkthrough” CTA.
- **July Newsletter (Trust Message):** “We don’t overpromise.” Used a real win-back theme and a single-click poll to capture contract pain points for follow-ups.
- **August Campaign (Change Management):** “What’s holding you back?” Named common blockers—workload, uncertainty, staff pushback—and invited open replies for tailored tips.
- **Q4 Programs:** Three parallel tracks—Past Prospects (“One Platform. One Team. No More Workarounds.”), Service-Industry variants (HVAC/Mechanical/Plumbing/Electrical), and Sage 100 Partner enablement. Each included industry-specific headers, motion assets, and direct CTAs to schedule live demos.

Challenges and solutions:

- List hygiene and segmentation → we standardized lists, simplified segments, and used polls/replies to tag interests.
- Time to creative volume → we used a motion template system to scale headers and variants without sacrificing quality.

3

Website & Sales Enablement

- Updated web copy and blog content to explain automated texting in plain language, including setup steps, message customization, and expected benefits.
- Equipped sales with visuals that show real interfaces and job status flows, supporting a “show, don’t tell” demo style.
- **Challenge:** compliance questions about texting.
- **Solution:** provided a short disclaimer pattern and guidance on routing replies (no new inboxes to manage).

RESULTS

Campaign health (June 2025):

Deliverability: 95.7% (1,188 delivered / 1,242 sent)

Unique open rate: 67.9% (730 opens)

Unique click-through rate: 10.9% (128 clicks)

CTOR: ~17.5%

Unsubscribe rate: 0.24%

Spam complaints: 0

Engagement signals:

- Polls and open-reply prompts supplied qualification data that fed follow-up sequences and partner handoffs.
- Motion creative increased time-on-email and supported “proof over promises” demos.
- **Unique click-through rate:** 10.9% (128 clicks)

LESSONS LEARNED

Clear messaging, thoughtful processes, tailored campaigns, and simple adoption—these are the levers that build trust, scale smoothly, reduce friction, and drive real growth.