

## CASE STUDY

# AI-POWERED MARKETING: HOW BROADRIDGE ADVISORSTREAM AND FAYE ENHANCED CLIENT ENGAGEMENT INSIDE SALESFORCE



## ABOUT BROADRIDGE

Broadridge Financial Solutions has powered corporate governance, capital markets, and wealth and investment management infrastructure for more than 60 years. Its technology, data, and intelligence solutions help financial institutions navigate complexity and drive transformation.

Within Broadridge, Advisor Solutions developed AdvisorStream, an AI-powered digital marketing platform built specifically for financial advisors. AdvisorStream automates social media, email marketing, newsletters, lead capture, website integration, licensed content distribution, AI insights, compliance workflows, and smart automation – allowing advisors to grow their business without increasing workload.



## THE CHALLENGE

AdvisorStream customers who also used Salesforce needed visibility into AI-powered marketing insights directly within their CRM. However, users were required to:

- Log into both AdvisorStream and Salesforce separately
- Manually replicate marketing data between systems
- Risk data entry errors and inefficiencies
- Operate without a unified view of marketing performance and recommendations

Broadridge sought a seamless integration that would embed AdvisorStream's marketing intelligence directly into customers' Salesforce environments.

Having previously partnered on five AppExchange products, Broadridge turned to Faye to develop a scalable, ISV-ready Salesforce integration.

*"Faye has a solid track record of delivering on commitments for Broadridge. Their subject-matter expertise has been instrumental in us bringing new apps to market this year. On top of everything else, they are enjoyable to work with."*

*- Vice President, Strategy & Business Development*



## THE SOLUTION

Faye built a seamless Salesforce integration that synchronizes marketing data between AdvisorStream and Salesforce, eliminating system silos and manual processes.

### **Bi-Directional Data Sync**

The integration enables:

- Contact and Campaign data to sync from Salesforce to AdvisorStream
- Lead and Campaign result statuses to sync back into Salesforce

This ensures advisors always have access to real-time marketing insights and engagement data without switching platforms.

### **Embedded Marketing Intelligence**

Faye introduced three key Salesforce components:

- Content Sent — Displays a history of AdvisorStream content delivered to each contact
- Content Interacted With — Shows which content clients engaged with
- Recommended Content — Surfaces AI-powered recommendations that can be sent directly from Salesforce

These embedded insights empower advisors to tailor outreach strategies based on real engagement behavior and AI-driven recommendations.



## RESULTS

The integration delivered a powerful, unified marketing experience inside Salesforce.

Now, advisors can:

- View content sent to clients
- Track which content clients engaged with
- Access AI-powered content recommendations
- Send recommended content directly from Salesforce
- Sync contacts and campaigns automatically

By combining automation, licensed premium content, and AI-powered insights, AdvisorStream helps financial advisors:

- Drive measurable growth through personalized engagement
- Attract and convert leads with timely communications
- Save time with automated marketing workflows
- Identify revenue opportunities based on client interests

The continued partnership between Faye and Broadridge is driving innovation in wealth management — delivering smarter marketing tools that increase efficiency, improve engagement, and produce measurable business results.

