

# ATTOLERO LLC

*Attolero is a specialized accounting firm exclusively serving small to mid-sized nonprofit organizations. With a lean U.S.-India hybrid team, they offer outsourced accounting, payroll, and nonprofit-specific tax prep (Form 990s). Though originally built through referrals, **the team recently shifted toward scalable growth by investing in smarter marketing and operational efficiency—ushering in transformative results through Levitate.***

## Prior Challenges

- ✗ No prior marketing function or CRM for marketing use
- ✗ A poorly performing offshore-built website
- ✗ Costly and ineffective paid ad campaigns

**It was the quickest ROI on a packaged service we ever had—literally built it, and in our first campaign we converted 85% of the people we sent that email to.**

Robert Bales, Founder

Levitate provided Attolero with a cohesive platform to upgrade their digital presence, build a robust marketing database, and launch highly targeted outreach campaigns. **The new website enabled job application capture and client inquiries, while database segmentation empowered them to deliver value-aligned email communications.** With easy-to-use marketing automation, **Robert’s team converted 85% of a target segment in a single campaign—unlocking previously untapped service revenue.** Levitate’s scheduling, email tools, and plug-ins also streamlined internal processes and cross-functional collaboration.

**The ability to create subgroups and segment messaging has been huge. It lets us say, 'Hey, I know these 10 customers need this—let’s go solve it.'**

## Key Results & ROI

- ✓ **85% conversion rate on their first email campaign using Levitate**
- ✓ **40** current clients added services based on cross-promotion campaign for financial report writing
- ✓ **1,000-person** segmented marketing database built from scratch
- ✓ **Increased inbound inquiries** due to elevated digital visibility

**87% EMAIL OPEN RATE**

*Attolero has seen both qualitative and quantitative gains through Levitate’s marketing engine—**driving revenue, efficiency, and brand equity** with a small team. By making marketing seamless and personalized, Levitate unlocked rapid wins and long-term strategic growth for their accounting practice in the nonprofit space.*

Robert Bales, Founder  
Attolero LLC, Levitate client since 2024.