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envestio

# Client Success Story



## Client background & challenge

Investio began as a private investment fund in 2014 and today is one of the leading companies in the “New Finance” or “Finance 2.0” industry which offers investors from different countries premium investment opportunities through online crowd-investing marketplaces. Investio offers public investors only those investment projects that passed a thorough and unbiased due diligence process, conducted by their professional team. They looked to Circlewise to:

1. Provide technology which allows them to manage a private program
2. Identify and manage for Investio best possible traffic sources on the market
3. Consolidate and optimize all of Investio’s connected traffic sources
4. Manage credit note creation and payments for the variety of sources





## Circlewise's impact:

# Greater profitability, accuracy & speed

Our partnership began in June 2018 and the program was launched 30 days later. The crowd-investing market was growing rapidly with a number of similar offers for investors. The main goal for Envestio was to differentiate through their offer and launch a private program to win investors as fast as possible. Via our tracking technology, Envestio could easily monitor the performance of each traffic source and invite more of them. Within a few months, Envestio became one of the leading brands in the industry. The result was a marked increase in the money invested by both existing and new Envestio users. Together, we also accomplished the following:

1. Provided and managed the tracking platform for Envestio's partner program
2. Consolidated all existing performance traffic sources
3. Established clear procedures for onboarding and connecting new sources
4. Managed customized payouts for all publishers





## By the numbers

The numbers are calculated by comparing Envestio's performance for a period of 90 days.

**67.3%** Growth in investments per month

**2M EUR** Investment Generated by Circlewise publishers

Within 30 days of going live with Circlewise, Envestio was able to far exceed their performance and business goals. Circlewise gave Envestio cutting-edge technology to transform their sales and marketing efforts to make it easy to discover and connect with the best traffic sources to find new investors to raise significant capital in a short period.



# Circlewise's value

## To Investio's Head of Finance

Our solution gave Eugene Kukin the confidence, visibility, and capability he needed to succeed in a crowded industry. By simply attracting and managing publishers in the our platform, he could be confident that his team together with Circlewise's technology would achieve their goals with the greatest ease and far less effort. This allowed Eugene to scale revenue well beyond his team's prior abilities, while preserving the size of the team, and increasing investment growth by over 67% per month.

"When we started our cooperation with Circlewise, I did not know what to expect. There were already a lot of crowdfunding and crowdfunding platforms in the market, so we were not sure if their platform would be the source of growth for us. Now I see that they accomplished something very powerful yet simple: they helped us to develop ourselves and become one of the most popular platforms in our industry. Without Circlewise's innovative technology (for reporting and publisher payments) and responsive service we would not be in the place we are today."



**EUGENE KUKIN**

Head of Finance, Investio



“Circlewise’s platform enabled me to rapidly reach numerous valuable traffic sources and connect them to our program. Beyond that, the biggest single advantage is the Professional Report dashboard where I can easily track in real-time the performance of each traffic source. This tool is perfectly tailored to our needs. After just six months of use, I can tell you one thing: if you have this powerful technology, managing an affiliate program is incredibly easy”



**ALESIA NIKALAICHYK**

Senior Account Manager, Envestio

Contact us today to learn how you can use our technology to launch, run, and scale your in-house affiliate program.

Learn more: [sales@circlewise.io](mailto:sales@circlewise.io)

