



# ASPIRE FINANCIAL SERVICES WEBSITE TRAFFIC EXPLODES BY 193% WITH HELP FROM PROGRESS

## Client



## Industry

Financial Services

## Products

Progress Kendo UI

Progress Sitefinity

## Summary

Working with Progress partner Bayshore Solutions, Aspire leveraged Kendo UI and Sitefinity CMS to envision, design, develop and market the brand's new online presence.

## Integrations

- Microsoft Dynamics CRM
- Google Analytics
- InvestDesignSM Center Advisor
- TPA Portal

## Challenge

Aspire Financial Services is a leading national service provider of smart retirement solutions, for all plan types including 401(k), 403(b), 457 and IRA. Headquartered in Tampa, FL, the company has been a Progress customer since 2013.

Aspire was looking for a better way to communicate its investment in people, processes and technology capabilities. However, its existing corporate site, which is also a gateway to its customer portal, was designed using WordPress, a platform that didn't support or represent the company's vision and goals. In addition to scalability and security concerns, WordPress required managing more than 10 disjointed sites—a setup insufficient to serve Aspire's broad base of customers and prospects.

As the new Chief Marketing Officer and SVP at Aspire, Shelia Reed decided to develop a new website from scratch—one that would reflect critical changes in brand and strategy while taking advantage of cutting-edge technologies, such as parallax scrolling (moving at a slower rate to the foreground, creating a 3D effect as you scroll down the page).

The team also wanted to build and integrate MVC widgets, which would enable them to create custom functionality and drop it into page templates and individual pages. “We were challenged with dismantling multiple separate websites and a conflicting brand framework, and improving content administration and the user experience,” Reed said. “At the same time, we could not risk disrupting our user base of 350,000 account holders and thousands of clients, who used the sites.”

Upon consulting Progress partner Bayshore Solutions, Reed decided to go with the recommended Progress® Sitefinity™ Content Management System (CMS). “We chose Sitefinity CMS after seeing the demo based on how it would satisfy our requirements, integrate with our Microsoft environment and meet expectations for evolving digital strategies,” she said. “The team was interested in building custom MVC widgets, and many other CMS solutions offered little or no support for it. Sitefinity supported MVC from the beginning, and Progress continues to support the technology in subsequent releases. This built the team’s confidence in our decision to adopt the platform.”

Kevin Hourigan, CEO of Bayshore Solutions, recommended Sitefinity CMS primarily because it is a .NET technology. “Sitefinity CMS integrates well with both MVC and Web Forms,” he said. “It delivers an easy-to-use, scalable solution with strong security management features.”

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Shelia Reed, Chief Marketing Officer and SVP,  
Aspire Financial Services

## Solution

Aspire and Bayshore Solutions worked to envision, design, develop and market the brand’s new online presence, consolidating 10 separate websites with more than 100 alias domains, and a corporate domain that was changed to AspireOnline.com—designed to preserve an uninterrupted navigation flow with its hundreds of thousands of users. Leveraging Sitefinity CMS and Kendo UI® by Progress, the new site accomplishes several goals:

- Position Aspire as the growing market leader in the smart retirement solutions industry
- Offer new and innovative resources and tools to increase customer engagement and conversion
- Improve the directed paths for target audience groups with the sub-goals of increasing communication and conversion
- Enable a subscription-based portal for richer content, online proposal generation and value-added content not offered in the main areas of the site

Website design features include a fully responsive website, enabling ease of navigation and customized presentation for any screen size. Custom graphics give the website design a truly unique visual brand experience.

The team used Kendo UI to enrich the site with graphical elements such as ROI calculators and calendars. Additionally, they built an MVC widget for the main navigation to enable fast integration of customized design elements. This also enabled the front-end developer to style the HTML and CSS natively, as the team was unfamiliar with how to customize the built-in Sitefinity navigation widget.

“We have developed several tools that enable users to search and filter large data in a consumable manner,” said Hourigan. One example is the Plan Search Tool,

which leverages Kendo UI to present investment advisor information to thousands of Aspire's 403(b) retirement plan partners and customers, including public school employees. This Plan Search Tool receives up to one million visitors per year, offloading some groundwork for advisors while providing additional value to plan participants.

"Using Kendo UI to build the various components has enabled us to help our partners get access to a complex market segment and tell a visual story that influences the decision to save for retirement," said Aspire's Reed. "For example, we can quickly serve up a geographical list of advisors in specific school districts for quick reference and on-the-spot enrollment, to start a retirement plan. The solution's flexibility has opened up huge opportunities for providing our advisors with better solutions to serve their customers."

Because the new site is built on Sitefinity CMS, Aspire's web administrators can easily and instantly manage and update the site. Sitefinity CMS also enables enterprise expansion and scaling, multiple page type templates, HTML content input through a WYSIWYG editor, user and user role-based website management and permission-based security.

A unique feature of the Aspire website design is the custom implementation of the InvestDesign<sup>SM</sup> Center advisor and TPA portal, a robust proposal generator to support clients and enable a professional, interactive and white-labeled presentation to end users. Bayshore Solutions' developers leveraged the Sitefinity CMS mobile module and integrated Bootstrap into master pages, a front-end web development framework that helps improve responsiveness. The scalable infrastructure of the Sitefinity platform enabled the developers to build multiple lead generation tools and automate data capture for daily proposals, while taking advantage of the platform's advanced user role controls to increase efficiency without jeopardizing security.

"There are many reasons we chose the Sitefinity CMS and Kendo UI—agility, scalability and the robust nature of CMS infrastructure were all deciding factors," said Nicholas Betlow, Creative Director, Aspire Financial Services. "We're constantly evolving our website and developing new ways to interact with our clients, such as building new applications; with Sitefinity CMS we can develop dynamic, powerful tools and go to market quickly with a very short development sprint."

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Kevin Hourigan,  
CEO of Bayshore Solutions

## Results

Launched in 2013 with subsequent build-outs, AspireOnline.com now has an average of 75,000 monthly users. In the first month after its launch:

- Website visits grew 193%
- Mobile phone visitors grew 385%
- The website delivered 111 qualified leads

In just three months:

- All traffic increased by 253%
- Visit duration grew 79%
- Bounce rate decreased 56%

"We knocked it out of the park with the new site. With the help of Sitefinity CMS and Kendo UI, we built an award-winning website that increases productivity, scalability and digital marketing efficiencies," said Reed. "We've also increased our self-sufficiency by enabling staff to update web content without depending on a skilled web developer—and that enables us to get content to market faster."

Since its launch, the new website has merited numerous industry awards, including a 2014 Gold ADDY in the Tampa AAF American Advertising Awards for design and creative excellence in a B-to-B services website, a Silver in the 2014 American Business “Stevie” Awards competition and two 2014 Horizon Awards: Gold Honors for Financial Services websites and Silver Honors for Responsive/Mobile websites, among many others. Continued customer feedback about the impressive and informative website is testimony to its success, as well.

“We are in the process of developing web strategies using multiple sub-domains for microsites, exchanging our data through APIs to other customer sites,” said Reed.

“We’ll continue to build and develop these sites inside the Sitefinity framework. As we grow and expand our business, Sitefinity CMS and Kendo UI will enable that growth, without requiring us to change our infrastructure.”

## About Aspire

Aspire—Delivering Smart Retirement Solutions

Aspire Financial Services, LLC is a leading service provider of smart retirement solutions, serving the industry since 2002 with a conflict-free, open-investment retirement planning management system. Aspire provides a best-in-class technology-enabled portfolio of pre-defined or highly customizable smart retirement solutions with private-label branding options through its proprietary technology platform and strategic partnerships. To learn more, visit [www.aspireonline.com](http://www.aspireonline.com) or call 866.634.5873.

## About Bayshore Solutions

Digitally driven, creatively refined and always results-oriented, Bayshore Solutions is the rare agency that delivers all the technology, creative and marketing expertise through an integrated team and proven methodology. Since 1996, the company has provided creative, innovative campaigns and the right technology to over 2,100 customers. Bayshore Solutions strives to understand customers’ goals, define audiences, create stories, implement technology and learn from outcomes. Its work is centered on creating digital experiences that evoke emotion, and the measurable results these emotions create.



## Learn More



Kendo UI Product Overview



Drive Content with Sitefinity CMS



Increase Lead Conversion with Sitefinity Digital Experience Cloud (DEC)

## Visit Website

[www.bayshoresolutions.com](http://www.bayshoresolutions.com)

[www.aspireonline.com](http://www.aspireonline.com)

## About Progress

Progress (NASDAQ: PRGS) is a global leader in application development, empowering the digital transformation organizations need to create and sustain engaging user experiences in today’s evolving marketplace. With offerings spanning web, mobile and data for on-premises and cloud environments, Progress powers startups and industry titans worldwide, promoting success one customer at a time. Learn about Progress at [www.progress.com](http://www.progress.com) or 1-781-280-4000.

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