

6 STEPS TO A SAVVY MARKETING STRATEGY

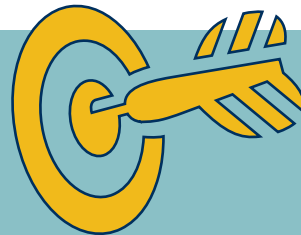
As a financial advisor, you know first impressions count – with prospects and new clients alike. Stand out from the competition and take your practice to the next level with these six simple steps.



When you consider that 66% of a prospect's due diligence occurs BEFORE he or she ever reaches out, it makes sense to invest in a cohesive, coordinated marketing plan that conveys your unique value proposition to prospective and existing clients.

STEP 1 SET GOALS

Do you want to grow AUM?
Improve client retention?
Focus on timely, measurable goals.



STEP 2 DEFINE YOUR AUDIENCE

Play to your strengths.
Is there a particular occupation or financial situation you know best?

STEP 3 SELECT STRATEGIES AND TACTICS

Not every strategy is right for every client, and not every marketing tactic makes sense for every advisor. However, consider whether a blog or active social media presence along with other strategies speaking to your expertise would allow your ideal audience to find you and help you move toward your goals.

STEP 4 REFINE YOUR MESSAGE

Create a compelling elevator pitch.
Your unique value proposition (UVP) explains why your target client should care about your business. Consider this approach:

Clients your business serves
+
Needs of your target clients
+
How your business addresses these needs
=
YOUR UNIQUE VALUE PROPOSITION

86%
of advisors using social media for their business said it helped them gain clients.

STEP 5 BUILD YOUR BRAND

Refine existing touchpoints and create new ones to reflect your brand appropriately. Review everything – from office decor to social media, from business cards and brochures to your website and blog – for alignment with your UVP.

57%
of clients will not recommend a business with a poorly designed or unresponsive mobile website.

STEP 6 DEVELOP A 12-MONTH PLAN AND MONITOR PROGRESS

Map out the actions you'll take to put your plan in motion and schedule regular reviews and updates.

GET STARTED NOW

Here's an [actionable one-page worksheet](#) with thought starters and tips to jump-start your marketing efforts.

And remember, having a plan is great, but it's the follow-through that matters.

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