

Welcome to the Equisoft Advance Series

Thanks for joining us.
We'll get started shortly.

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CE-credited Webinar

How to Build a Marketing Plan as a Financial Advisor

Equisoft Advance Webinar Series



advisor.equisoft.com

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Why is it important to set and follow a clear marketing plan?

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Why is it Important to Create and Follow A Clear Marketing Plan?



A holistic and clear marketing plan will help you **communicate your unique value proposition clearly and consistently** across all marketing channels.



Understanding how to approach different marketing channels will allow you to **tailor your messages to resonate with your target audience's needs and preferences.**

Objectives of Marketing Plan:

- ▶ Provides a roadmap
- ▶ Ensures consistency
- ▶ Maximizes resources
- ▶ Facilitates measurement and optimization
- ▶ Enhances accountability

What are the essential components of a successful marketing plan?

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Equisoft Advance Webinar Series - Social Media & Content Marketing Strategies for Financial Advisors

Essential Components Of a Successful Marketing Strategy



Set marketing objectives



Define your "ideal clients"
and "ideal offers"



Select the right marketing
strategies



Define and measure
marketing metrics

1– Set Marketing Objectives



Your marketing plan needs to be aligned with your business plan and goals

Business Goals

Your marketing plan should help you achieve your business goals, such as # of households, income, AUM, insurance premiums, etc.


Branding Priority

It is crucial to make sure your marketing helps you build your brand and create awareness in your market

Lead Generation Priority

It is crucial to make sure your marketing is driving leads. One common mistake by marketing is to not driving sales. Lead generation is a key step that aligns marketing and sales

2 – Define your "ideal clients" and "ideal offers"



A successful marketing plan requires a clear targeting of an offer to a market segment

Value Creation

Review your existing client services and list down the main value you create for your clients. This information will serve as a foundation for designing targeted marketing strategies that replicate successful patterns.

Focus on the “What”

List down “what” services you offer the best to your clients. This becomes your “offer” which is key for a successful marketing campaign.

Focus on “Who”

List down who your ideal client is. Deep review of your CRM data can help you drive more success from your marketing.

Niche marketing is a “nice to have” but not required for a successful marketing campaign

3– Select the Right Marketing Strategies

Marketing is an investment of time and money and you must make a clear commitment to few marketing strategies.

Always focus on a “long term” view when making marketing strategy choices.

Current proven marketing

Make a list of all your current marketing strategies and identify what is working and what is not.

New opportunities

Identify new marketing opportunities such as digital marketing and social media marketing strategies. Narrow even further on what specific platform or strategy you want to consider.

Execution

Always keep implementation options in mind while making a selection of marketing strategy. Execution of a marketing plan is critical for success.

4– Define and Measure Marketing Metrics

Your marketing must be measured for success. Different marketing strategies have different marketing metrics.

We live in a “data-driven” marketing world and must only use strategies that can be measured.

ROI of marketing is key

Define the investment you are willing to make on marketing and how to measure the outcome.

Branding metrics

Getting your name out is a key part of marketing. Metrics such as impressions, view, engagement, etc. can help you see if your marketing is working or not.

Lead generation metrics

Key metrics are cost per lead, cost per meeting and cost per client. This will help you get a clear ROI on your marketing spend.

What are the various marketing tactics, and how can you determine which ones to prioritize for the highest return on investment (ROI)?

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Marketing Tactics and Channels



Referral (Clients & COI)

Use your existing network and get more introductions with new leads.



Event marketing

Participate and sponsor events to increase brand visibility and drive more leads.



Seminar and Webinar Marketing

Conduct seminars/webinars to educate people and find new potential leads.

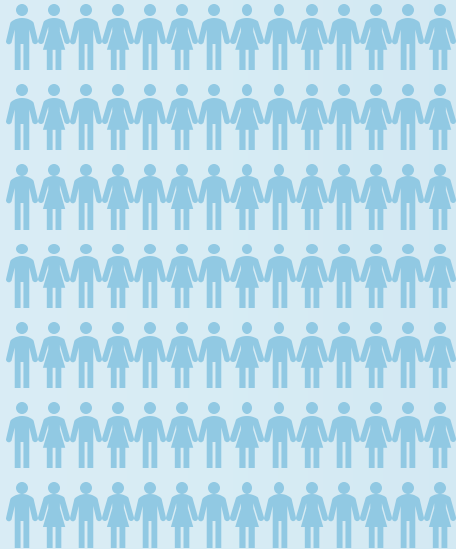


Digital and Social Media Marketing

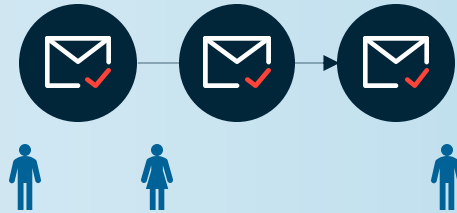
Use the power of social media, AI, and automation to improve your brand recognition and generate more leads.

The Big Picture of Your Marketing... Build Your Platform

Cold Market



Campaign



Nurture Your List

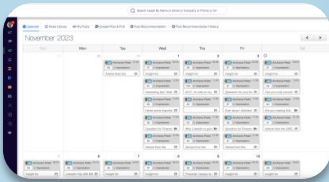


Book Meetings



Social Media Marketing "System"

Branding



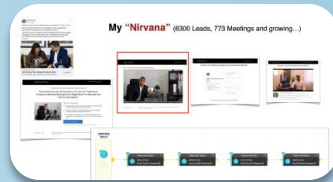
Content Marketing
(right and smart)



Website
(smart)



Webinar/Seminar
(events)



Funnel
(nirvana campaign)

Lead Generation

1

LinkedIn
Outbound campaigns



2

Facebook Ads
Inbound campaigns



3

Email campaigns



What elements are considered essential in a successful marketing plan?



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Important Elements of a Marketing Plan



Content Marketing

Publish content on various social media platforms to increase awareness



Email Marketing

Use educational emails to build awareness, and to drive leads and appointments



Outbound Marketing

LinkedIn is a great platform to reach out to your ideal clients and drive appointments.



Inbound Marketing

Facebook/Instagram/Google Ads are a powerful way to get high intent, inbound leads and appointments.

KPIs and ROIs



Content Marketing KPI

- 10,000+ impressions each month



Email Marketing KPI

- Lorem ipsum



LinkedIn Outbound KPI

- Reach out to 900 people
- Connect with 300 people
- Book 5-15 appointments each month



Facebook Ad Inbound KPI

- \$25 / Lead
- \$100 to \$200 / Appointment
- \$500-\$800 / Client
((\$500K + investable asset clients))

How can financial advisors implement their marketing plan for sustainable success?

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How to Build a Marketing Plan as a Financial Advisor

Start with your
"Business Plan"

Think of a
"Marketing Plan"
with long term focus

Build a
"Marketing Plan"

2 main goals for a good marketing plan should be:

- ▶ **Branding**
Create your brand awareness with your "ideal" clients
- ▶ **Lead Generation**
Drive new leads and appointments with your "ideal" clients

- ▶ Review your current marketing activities
- ▶ Identify gaps to business targets
- ▶ Look for new marketing initiatives (Consider social media marketing if not using)

Models of Implementation

Do it yourself

- ▶ Time commitment
- ▶ Learning commitment
- ▶ Cost effective method

Delegate to internal team

- ▶ Find the right person
- ▶ Train person
- ▶ Good systems to track

Outsource

- ▶ Find right-fit agencies
- ▶ Very high cost
- ▶ Very high risk

Key Takeaways

It is important to set and follow a clear marketing plan

- ▶ This ensures consistent communication of your unique value proposition across all channels.


Pick the marketing strategies and tactics that work the best for you

- ▶ Find the right balance between a holistic and achievable strategy



Put together an implementation strategy

- ▶ Define your KPIs, assess your workload and expertise, decide on an implementation model



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[Equisoft Advisor Quiz](#)



Thank you for joining us today!

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