

The Marketing Playbook

Proven Strategies for Financial Advisors

Presented by



**HUGHES
INTEGRATED**



**Many good advisors
fumble marketing.**



THE STRUGGLE IS REAL...

What is your greatest pain, in marketing?

- NOT ENOUGH TIME
- COMPLIANCE. *Oh Compliance...*
- DON'T KNOW HOW TO EXPLAIN WHAT I DO?
- FEAR OF REJECTION
- STRUGGLE WITH CONSISTENCY
- LIMITED BUDGET
- NO TARGET AUDIENCE
- I'VE SURVIVED ON REFERRALS...

Marketing is Relationship.

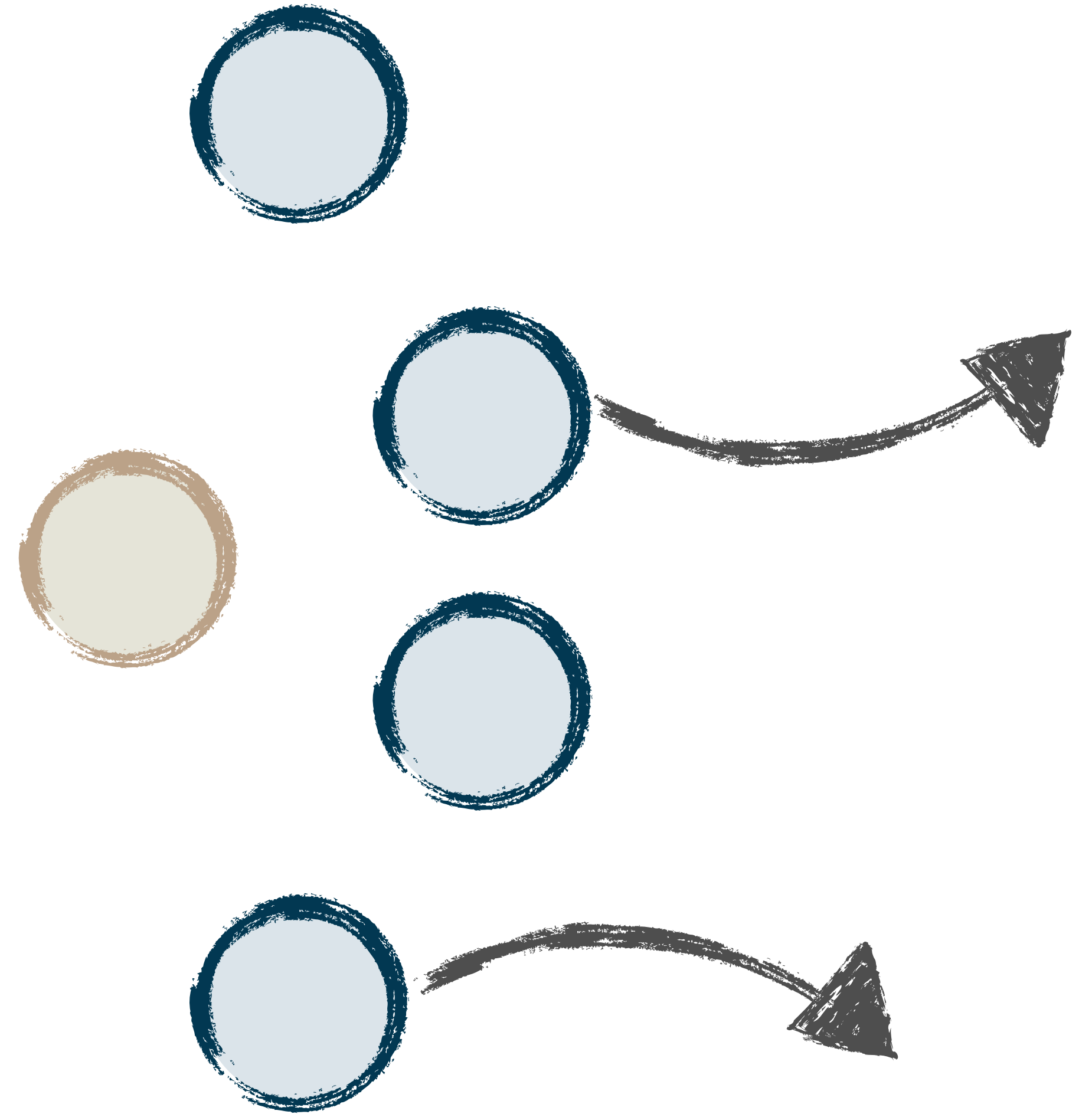
The Marketing Playbook

1. Ideal Client Profile

2. Clear Message

3. Build Relationships

4. Analyze the Results



Ideal Client Profile

Who is your **target** client?

**FUTURE
RETIREE**



**BUSINESS
OWNER**



**YOUNGER
COUPLE**



Clear Message

“Advisors who are able to **differentiate** in a crowded landscape see superior growth metrics by their ability to **stand out**.”

-Michael Kitces

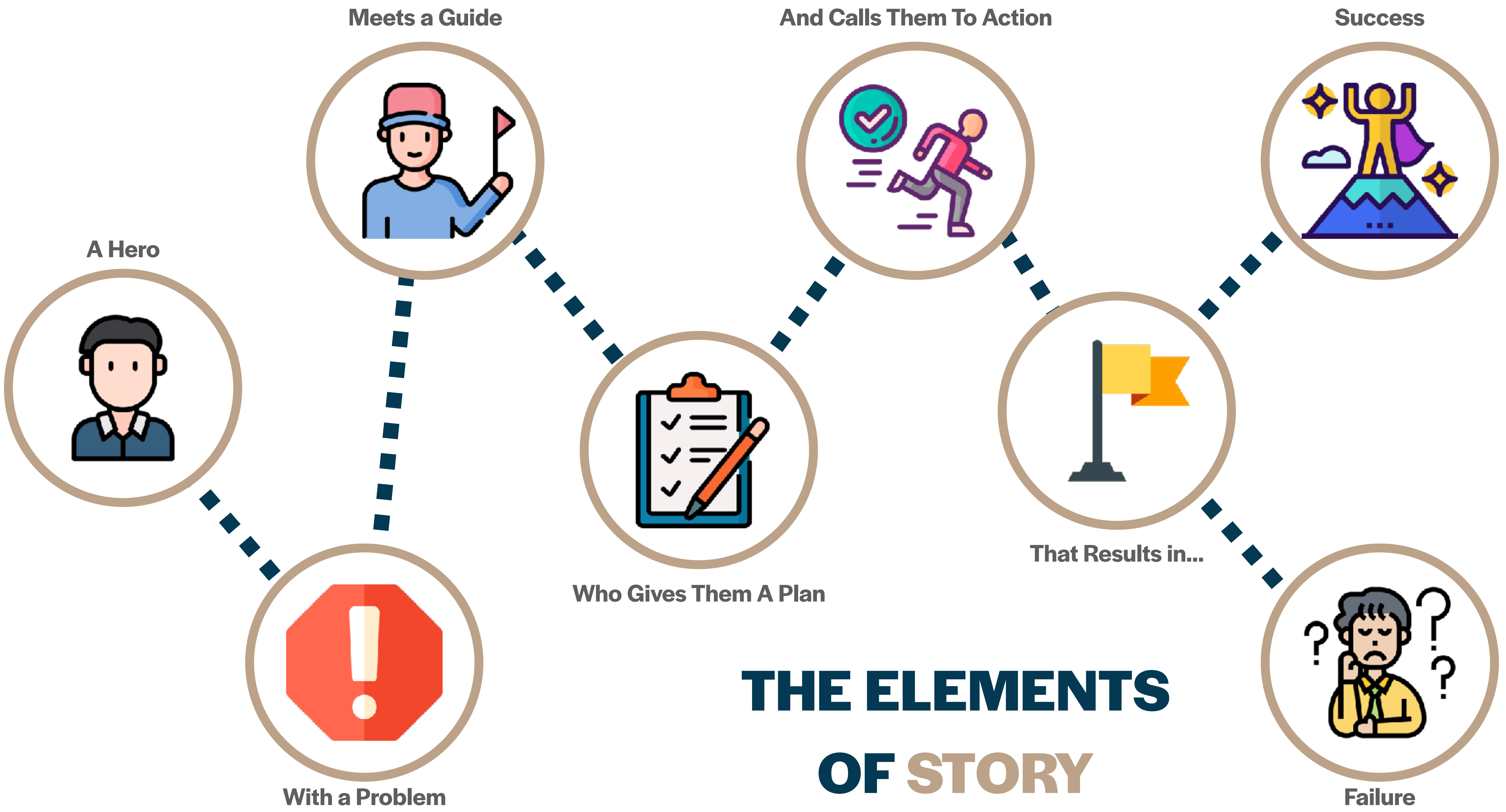


- 1. Appeals to need**
- 2. Said simply**

**People make choices when
they read the words that
matter to them.**



THE POWER OF STORY.



THE ELEMENTS OF STORY

The problem is
their story.

YOUR ELEVATOR PITCH

PROBLEM



SOLUTION



SUCCESS



YOUR ELEVATOR PITCH

PROBLEM



The problem is the story.

- Be specific
- Make sure it's a pain point
- Get it down to a sound bite

YOUR ELEVATOR PITCH

SOLUTION



Position your service as the solution to their problem.

- Make it feel new.
- Make it simple.
- Make it brief.

YOUR ELEVATOR PITCH

SUCCESS



Cast a vision for success.

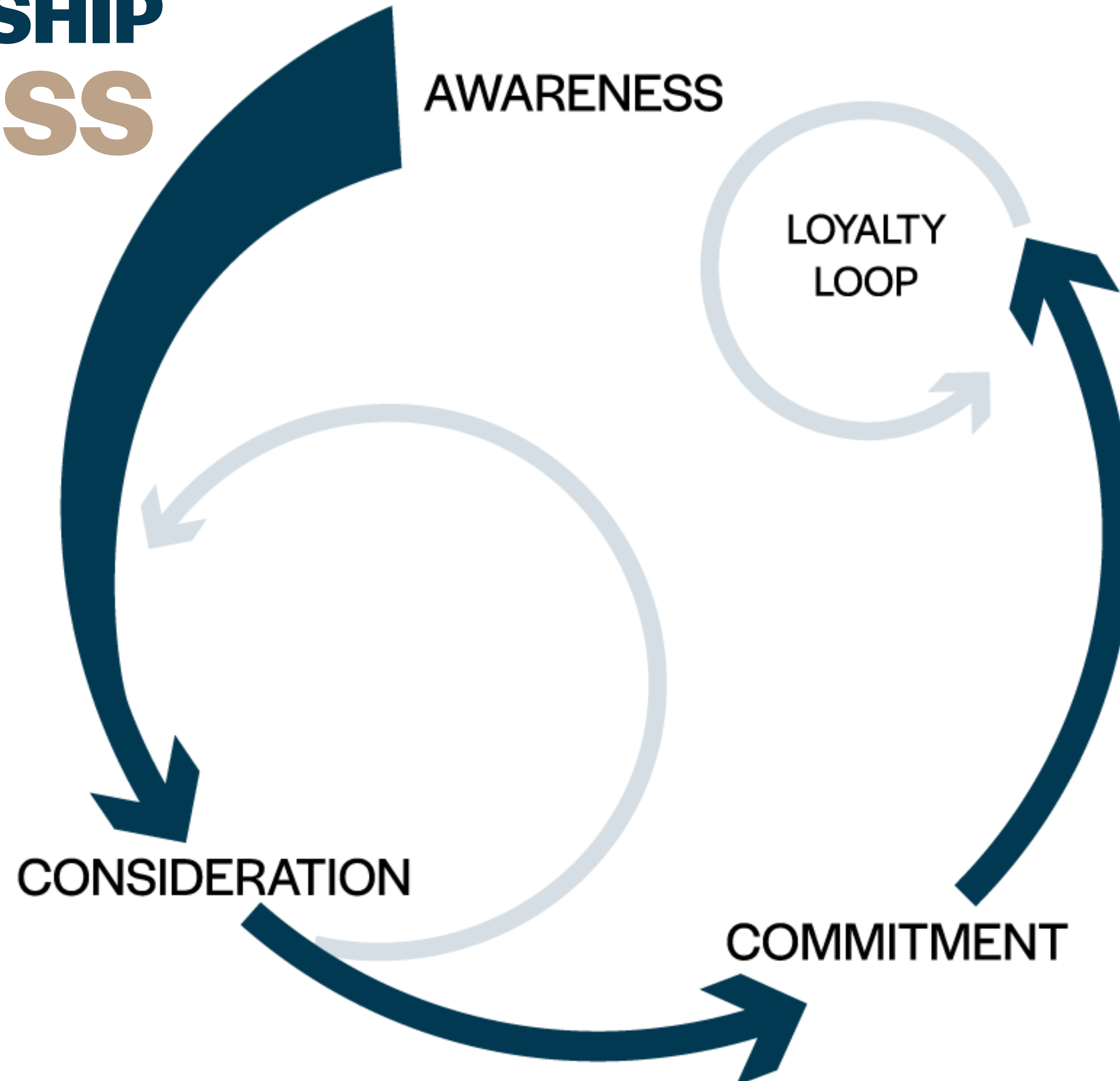
- Make it the “controlling idea” of your business.
- Make it something they want.
- Make it clear.

Build Relationships

RISK

RELATIONSHIP

RELATIONSHIP PROCESS



Disclaimer.

The background features a faint, hand-drawn tactical diagram on a dark grey surface. It includes several 'X' marks and 'O' marks arranged in a grid-like pattern. A central vertical line with an upward-pointing arrow is prominent. Other curved arrows indicate movement or flow between the 'X' and 'O' positions. A 'T' shape is also visible near the bottom right.

AWARENESS

AWARENESS

> EXPAND YOUR AUDIENCE

- **Clear Message**
 - ▶ Centers of Influence
 - ▶ Personal Networking
 - ▶ Employees and Team
- **Online Directories** (PlannerSearch.org profile , SmartVestor®, XY Planning, other)
- **Website w/ Search Engine Optimization**
 - ▶ Audience Pages
 - ▶ Service Pages
 - ▶ Location Pages
- **Google Business Profile w/ Products Listed**
- **Advertisements** (Digital or Analog)



AWARENESS

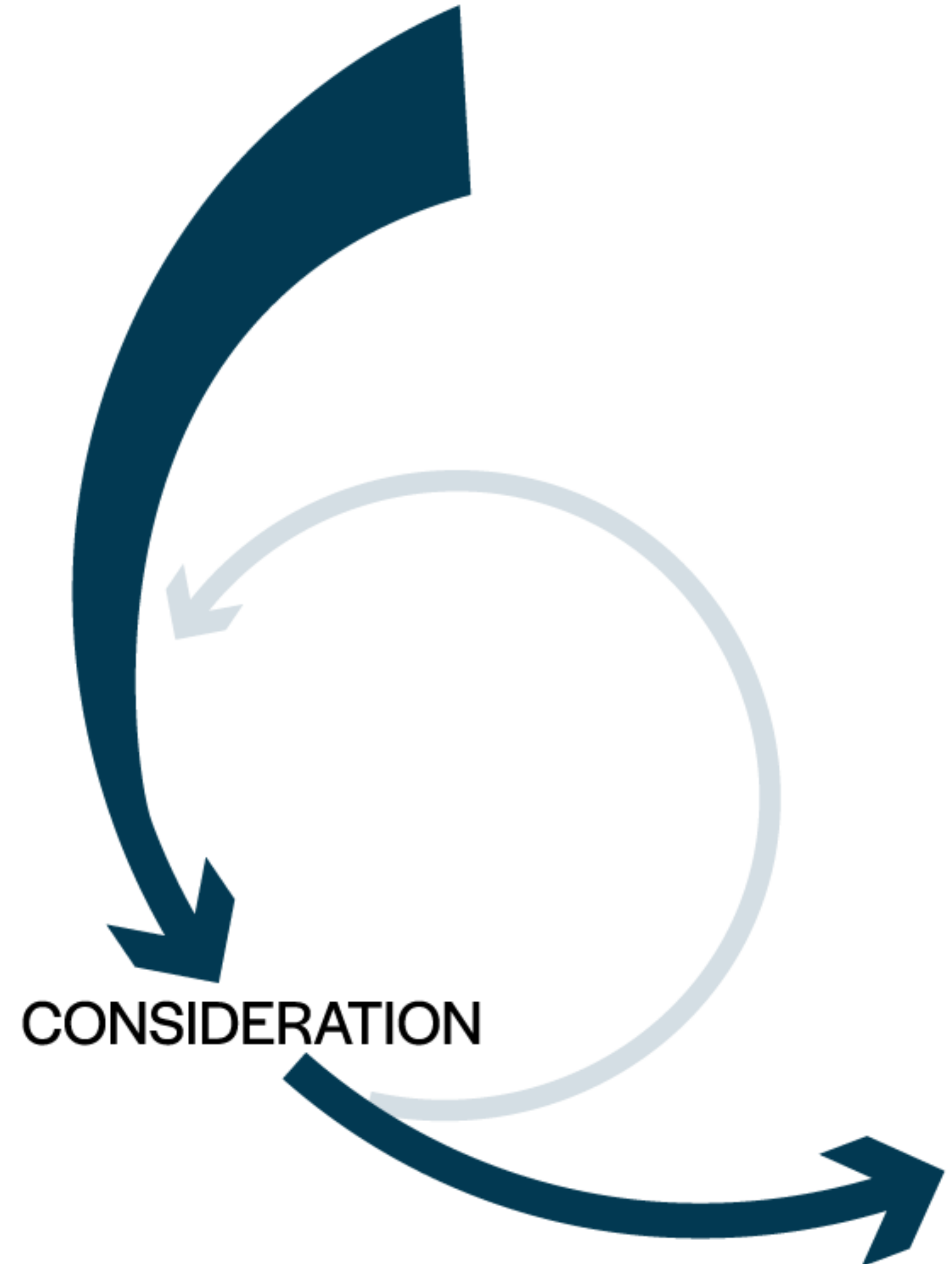
The background is a dark grey surface with faint, horizontal white lines, resembling a chalkboard. Overlaid on this are several hand-drawn white tactical diagrams. These include: a central vertical arrow pointing upwards; two curved arrows on the left side, one pointing up and one pointing down; a curved arrow on the right side pointing upwards; a horizontal line with a T-shaped symbol in the center; and several 'X' and 'O' symbols scattered across the board, some connected by lines to other symbols, suggesting a strategic layout or movement plan.

CONSIDERATION

CONSIDERATION

> BUILD TRUST

- **SEO and AEO rich content**
 - ▶ 52 Questions —> Articles, Posts
 - ▶ FAQ & Video FAQ
 - ▶ Market Commentary
- **YouTube Videos** - Titles & Descriptions
- **Dedicated landing pages** to lead sources
(SmartVestor Pro, Financial Planner “near me,” others)
- **Email campaign to nurture list w/ content**
- **Retargeting advertisements**



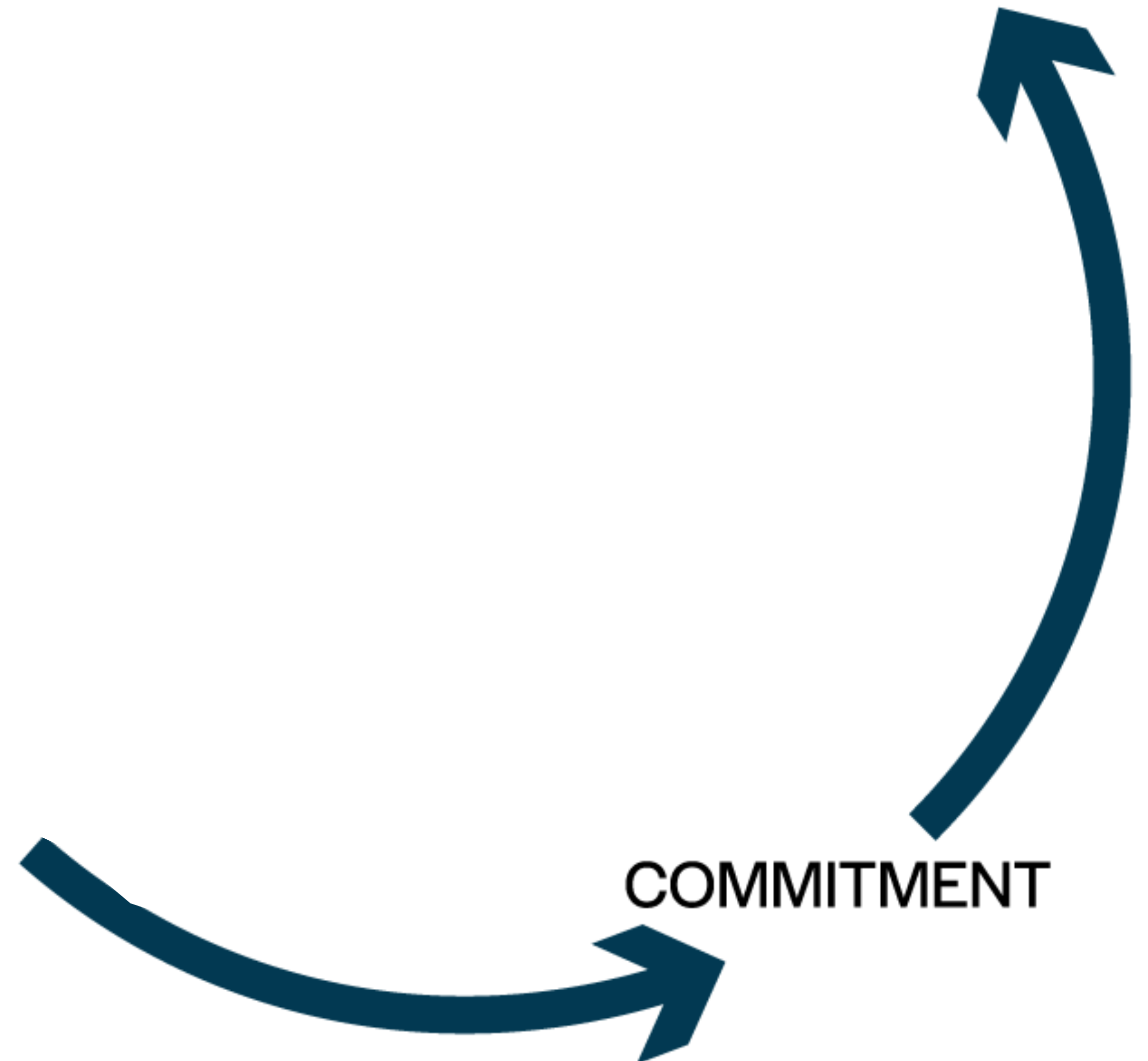
The background features a faint, hand-drawn tactical diagram on a dark gray surface. It includes several 'X' marks and 'O' marks arranged in a grid-like pattern, with various curved and straight arrows indicating movement or strategy. The word 'COMMITMENT' is overlaid in large, bold, white capital letters.

COMMITMENT

COMMITMENT

> PROMPT ENGAGEMENT

- **Landing pages offering access to resource in exchange for email address:**
 - ▶ How to Retire Workbook
 - ▶ 15 Ways to Finance College
 - ▶ 3 Ideas to Increase EBIDTA pre-sale
- **Live webinars or in-person seminars**
- **Clear “Call To Action”** (ie. Talk with an Advisor, Schedule a Call, etc.)



LOYALTY LOOP

A faint, hand-drawn diagram in the background illustrates a 'Loyalty Loop'. It features a central vertical arrow pointing upwards. To the left, a curved arrow loops from a circle at the bottom back to a circle at the top. To the right, a curved arrow loops from a circle at the bottom back to a circle at the top. There are several 'X' marks and circles scattered around the diagram, suggesting a process flow or a cycle of events.

LOYALTY LOOP

> RETENTION & REFERRALS

- **“What to Expect” onboarding messages**
- **Client Service Calendar**
- **Video Email** (Loom, VidYard, BombBomb, etc)
- **Phone calls** (or texts?)
- **Client events & workshops**
- **Gifts & cards acknowledge key dates**



FUTURE RETIREE

AWARENESS

CONSIDERATION

COMMITMENT

LOYALTY

BUSINESS OWNER

AWARENESS

CONSIDERATION

COMMITMENT

LOYALTY

YOUNGER COUPLE

AWARENESS

CONSIDERATION

COMMITMENT

LOYALTY

Execute the Plan

“What gets **measured** gets **improved**.”

- Peter Drucker

MARKETING SCORECARD METRICS

	Tactic	Lead Measure	LAG Measure
AWARENESS (EXPAND AUDIENCE)	Door knocking	# of 1:1 Conversations	# Qualified Prospects
	In-person networking	# of 1:1 Conversations	# Qualified Prospects
	Centers of influence (COIs)	# of 1:1 Conversations	# Qualified Prospects
	Search Engine Optimization (SEO)	# Keywords	# Site Traffic
	Social media networking	# Posts, Comments	# Followers
	Directories	# Directory Listings	# Website Visitors per Directory
	Google Business Profile	# Impressions	# Clicks
	Digital ads	# Impressions	# Clicks
CONSIDERATION (BUILD TRUST)	Social Media Posts	# Reach	# Engagements
	Blogs	# of Posts	# Engagement Time
	Videos	# of Posts	# Views
	Podcasts	# of Posts	# Downloads
	Email nurture campaigns	% Open Rate	% Click Rate
	Retargeting ads	# Impressions	# Clicks
COMMITMENT (PROMPT ENGAGEMENT)	Seminars, Workshops	# Invites Sent	# Registrations
	Resource downloads	# Landing Page Views	# Conversions
	"Bring a Friend" Educational events	# Invites Sent	# New Contacts Added
	Call-to-action	# Landing Page Views	# Conversions
LOYALTY LOOP (RETENTION & REFERRALS)	Video email	# Relationship Deposits	# Views
	Client events	# Invites Sent	# New Contacts Added
	Client relationship health	# Relationship Deposits	# NPS Survey
	Referrals Campaigns	# Referral Prompts Made	# Referrals Received

“Ready. Set. **Grow!**”

- Rob Hughes, MBA

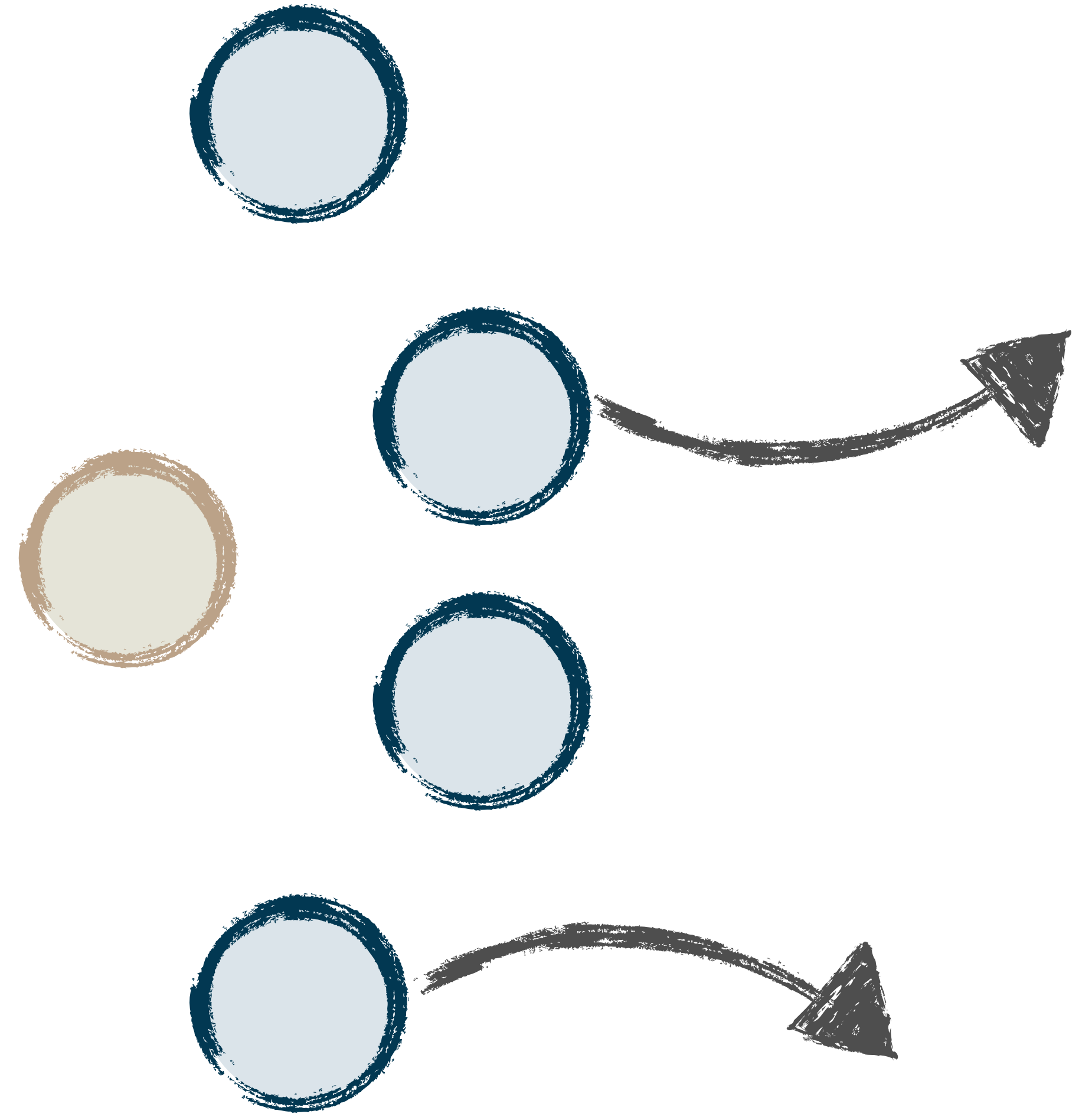
The Marketing Playbook

1. Ideal Client Profile

2. Clear Message

3. Build Relationships

4. Analyze Results



Marketing is Relationship.

NEXT STEPS

1

Do Nothing.

2

Do It Yourself.

3

Let us Help.



WANT TO CHAT?

← **Schedule a call!**

