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Marketing Tips for Financial Advisors

*who don't know much
about marketing*





Define a plan.

77% of financial advisors **do not have** a defined marketing plan.

86% of advisors don't know which marketing tools to **use to build leads**.

Learn where your **target demographic** spends their time, and choose the tools that work best for this group of people.

2

Like-it and love-it.



LIKE IT group

They know who you are, but they are not (yet) clients.

They are being prepared to become clients through brand marketing.



LOVE IT group

They are already clients.

They are brand advocates, telling their friends about you.

Market to the LIKE-IT group through the eyes of the LOVE-IT group.

Show the LIKE-IT group **why** the LOVE-IT group loves your services so much.

3

Measure everything.

Collect the data, visualize it, draw out insights.

Spend 5 minutes watching a video about pivot charts to help you visualize data.

Identify where you are successful and where you are coming up short, then make adjustments to your plan.

4

Replicate it.

If you find something that works, **replicate** it!

Social media going crazy? **Post another** with the same voice or humor.

Newsletter getting a great click rate? Send another next month with the same voice and same type of **valuable information.**



Discover more tools to help financial advisors succeed.

