

Marketing Strategy Checklist

As a financial advisor, you know marketing is important, but how do you know where to start? We've created a simplified checklist of the most important marketing strategies in 2020. How many of these strategies are you using?

TECHNICAL STUFF

- Do you have a website for your business **that is secure** (SSL Certificate) **and mobile responsive**?
- Has your site **been optimized for search engines (SEO)** to target your specific keywords?

WEBSITE

- Does your website clearly articulate the **one urgent problem you solve for a specific group**?
- Do you have a section where you share **your background, story, passion, and personality**?
- Do you have a **"Get Started Now" page** on your site where people can schedule a call with you using an online appointment scheduler?
- Does your site have a **"Sample Financial Plan"** where people can understand how they would work with you and what they're buying?
- Do you feature **how you get paid** and all of the services you provide?
- Have you **created case studies or client profiles** of clients you've helped?

COMMUNICATION

- How many **people are on your email list** (prospects, clients, COIs)?
- Are you **adding contacts to your email list** every month to grow your referral base?
- Do you **proactively ask for referrals** at least twice per year?
- Do you send **monthly marketing emails that remind people** who you serve, how you help, and that you're taking on new business?
- Are you **regularly publishing unique content** (blog posts or articles) that is uniquely valuable and relevant to your target audience?

SOCIAL MEDIA

- Do you have **professionally optimized and active social profiles** on Facebook, LinkedIn, and Twitter for your business?
- Do your social profiles include **custom cover images and strong calls to action**?

VIDEO

- Do you have a **high-converting video or webinar** where people can learn more about you?
- Are you **proactively promoting your webinar** or call to action on LinkedIn using direct messages?

METRICS

- Do you **track your metrics at least monthly** to understand how your marketing campaigns are performing?