

DIGITAL 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. HOW MANY OF THESE STRATEGIES ARE YOU USING?

- ☐ Do you have a website for your business **that is secure** (SSL Certificate) and **mobile responsive**?
- ☐ Does your website clearly articulate the **one urgent problem you solve for a specific group**?
- ☐ Do you connect with your prospects on your homepage with **a warm and inviting personal video**?
- ☐ Do you have a section where you share **your background, story, passion, and personality**?
- ☐ Has your site been **optimized for search engines (SEO)** to target your specific keywords?
- ☐ Are you **regularly publishing unique content** (blog posts or articles) that is uniquely valuable and relevant to your target audience?
- ☐ Do you send **monthly marketing emails that remind clients** and COIs who you serve, how you help, and that you're taking on new business?
- ☐ Do you **proactively ask all your clients and COIs for referrals** at least twice per year?
- ☐ Have you asked your clients to leave you a **review on your Google My Business** to help fuel your website traffic?
- ☐ Do you feature **client case studies or client experiences on your website** for prospects to see how you partner with your clients?
- ☐ Are you **adding contacts to your email list** every month to grow your referral base?
- ☐ 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 the services you provide**?
- ☐ Have you **created case studies or client profiles** of clients you've helped?
- ☐ Do you have a **"Get Started Now" page** on your site where people can schedule a call with you using an online appointment scheduler?
- ☐ Do you **have a high-converting video or webinar** where people can learn more about you and your expertise?
- ☐ Are you **proactively promoting your webinar** or call to action on LinkedIn using direct messages?
- ☐ 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**?
- ☐ Do you **track your metrics at least monthly** to understand how your marketing campaigns are performing?