

osaic

# Marketing plan checklist:

Level 2



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## Let's get started!

Welcome to our Marketing Plan Checklist: Level 2, where we look into the intricacies of effectively promoting your brand, products, and services. As you progress from Level 1, you will find that marketing extends far beyond basic principles and strategies. In Level 2, we explore advanced techniques that can help you stand out in today's competitive financial landscape. From client segmentation and targeted campaigns to data-driven decision-making, this guide equips you with the knowledge necessary to elevate your marketing efforts to new heights. Get ready to unlock the full potential of your business.



# Evaluate all platforms for cohesive branding

Ensuring cohesive branding across all marketing channels is critical to establishing a solid and recognizable brand presence. The recommended strategies below support the development of a consistent and strong brand presence, while also helping to build trust and recognition among your audience. The key here is **consistency, consistency, consistency**.

- Develop brand guidelines that detail how your brand should be represented across all platforms.**
  - Create a consistent visual identity:
    - » This should include your logo, selected color scheme, and typography.
    - » Make sure that all marketing materials, both on and offline, adhere to these visual elements and complement each other (i.e., logos and color schemes, business cards, brochures, website, email marketing, social media profiles, etc.).
  - Use consistent imagery:
    - » Maintain a consistent style for images and graphics across all platforms.
    - » Choose imagery that aligns with your brand identity and conveys a consistent message.
- Maintain consistent messaging:**
  - Include keywords that express your brand.
  - Craft a consistent brand voice and messaging across all communication channels.
    - » Ensure that the tone and language used in your content is uniform across your website, social media, and/or print materials.

**Pro-tip:** Use branded email templates that align with your overall visual identity.

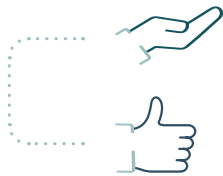
- Ensure your website features a Responsive Design:**
  - Optimize your website for a consistent user experience across various devices, including mobile.
  - Ensure that your website design aligns with your overall brand aesthetics.
- Social media consistency:**
  - Use the same profile picture, cover photo, and bio information across all social media platforms.
- Regular audits:**
  - Conduct quarterly or biannual audits of your marketing materials and channels to identify and rectify any inconsistencies.
  - Keep an eye on changes in the industry and/or any client preferences that may require adjustments to your branding strategy.



# Social media: engage, like, comment, share

Building a strong social network is vital to growing your client base and enhancing your brand reputation. Staying active and consistent builds critical trust and credibility.

View your social media presence as two-prong. Prong one includes sharing your own content, and prong two includes engaging, liking, and commenting on others' content. Social media is intended to be social and because you are dealing with humans on these platforms, reciprocity naturally occurs. Meaning, if you like and comment on others' content, others are therefore more likely to like and comment on your content. This engagement is read by social algorithms as "valuable content that viewers want to see" and will increase visibility of your content for greater exposure (meaning, social media algorithms will push your content in front of more eyes if you spend time interacting – liking, commenting, sharing – with content posted by others).



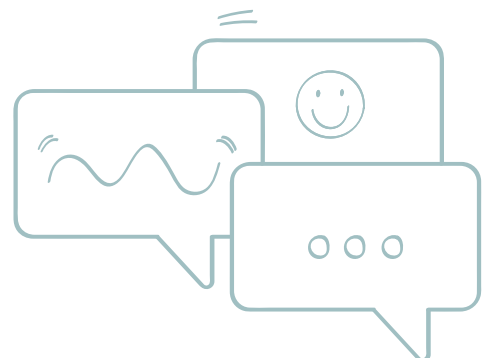
**Sharing your own content**



**Engaging, liking, and commenting on others' content**

**Pro-tip:** Dedicate 10 minutes daily to liking and commenting on others' content as well as replying to comments made on your content.

- Establish yourself as a thought leader by regularly providing quality content that speaks to your audience (ideal client), along with your valuable insight or perspective on the subject.**
- Share content to help your audience easily digest and understand complex and relevant topics.**
- Incorporate visually appealing elements such as images, infographics, and videos. Visual content attracts more attention and engagement on social media platforms than text-only posts.**
- Promptly reply to comments made on your content, ideally within 2-24 hours.**
- Remember, growing a social network takes time and continuous effort. Focus on building genuine relationships, providing value, and positioning yourself as a trusted expert in the financial industry.**



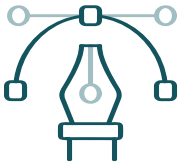
**Pro-tip:** To strike the right balance of content, for every 10 posts, remember the 5:3:2 Rule:

- 5** posts should be **CURATED** content (content you share from other sources) that is relevant to your audience.
- 3** posts should be **CUSTOM** content **YOU** create that is relevant to your audience.
- 2** posts should be fun, personal content that humanizes your brand to your audience.

**Pro-tips:**

- Don't forget to periodically ask your clients to follow your social media platforms to help drive engagement and increase followers. When you post content of specific interest to one of your client segments, send it to the segment and ask for comments.
- Invite clients to follow you on social media as part of your onboarding process. Check out MyCMO for email and social post examples of how to invite clients to find you on social media.

Planning space:



# Create custom marketing content

It's well known the top performing content on social media is custom content. Creating custom content is a wonderful way to foster meaningful connections with clients and prospects, as it opens doors to mutually shared interests and personal insights. Check out the following tips to help you tackle the creation of custom content across channels:

- It is highly encouraged that you share your story, also referred to as sharing your why. Why are you passionate about the service you provide? What led you to get into the financial space? Sharing personal and professional stories helps to humanize your brand and connect with your network, making your content more relatable.
- Encourage discussions and ask questions within your posts to encourage engagement.

Encourage discussions



Ask questions

- Make sure to use hashtags wisely. By taking a few minutes to research and use relevant hashtags, you can increase your content's discoverability.

**Pro-tip:** Create a branded hashtag to promote consistency and make it easier for your ideal clients to find your content.

- Be aware of industry regulations and compliance standards when sharing financial or advisory information.

**Pro-tip:** Use frequently asked questions you receive from clients as inspiration for creating custom content.

Planning space:



# Diversify your digital content mix

Diversification within your digital content mix helps boost your holistic marketing efforts by catering to different clients and prospects' media consumption habits. When offering a variety of content formats, you can increase your engagement levels by encouraging different forms of interaction and feedback. It is this active engagement that contributes to stronger relationships and fosters a sense of community around your brand. Start by defining your long-term vision for your business.

- A diverse content mix helps increase your brand's visibility across digital platforms and channels. When you consistently produce valuable content in different formats, you increase the likelihood of reaching potential clients who may not have encountered you otherwise.**
  - Share insights, tips, and industry updates to position yourself as an expert in your field.
  - Make sure to position yourself as a reliable source of information.

Websites:

- While some of your website visitors may prefer a blog format, others may prefer a visual diagram, so varying the content you provide can broaden your reach.**
- Experiment with different content formats:**

Articles	Images	Infographics	Webinars
Videos	Newsletters	Podcasts	Blogs

**Pro-tip:** Use available analytics to track the performance of your content and analyze which types resonate most with your audience. Adjust your content mix accordingly.

A content mix that includes diverse types of content can help improve your Search Engine Optimization (SEO) efforts. Search engines favor websites that regularly produce high-quality, relevant content.

Planning space:



# Marketing segmentation

When it comes to marketing, one size does not fit all. By segmenting your client database into clearly identifiable groups (a.k.a. segments), you can focus your marketing efforts on targeted campaigns. Segmentation allows you to provide your clients with the right message, at the right time, through tailored communications that show clients you're paying attention and understand what matters most to them and their needs. This meaningful and personal touch helps to leverage the relationships you've already built and often deepen them, while also enhancing referability. Segmentation can also allow you to run your business more efficiently and effectively, helping to drive revenue and growth.

- A common segmentation practice is to target by asset level, using simple group assignments like A/B/C or Platinum/Gold/Silver clients.**
  - This can help you decide how frequently to contact your clients and/or who should receive a holiday card or annual gift when budget, time, and/or other resources are thin.

**Pro-tip:** Other popular segments regularly used include similar characteristics, attitudes, commonalities, needs, interests, and behaviors.

- Understanding your client and target audience preferences, interests, and pain points allows you to tailor your content to address their specific needs.**
- Review available resource, [The Benefits of Segmenting](#), for additional information, located on OneHub.**

Planning space:





# Source and schedule content in advance with a digital platform

Creating a marketing plan that is scalable and repeatable is key to a long-term, sustainable approach. Digital marketing platforms make efficiency possible by allowing you to browse thousands of preapproved pieces of content in a variety of formats that are easily customizable, and to schedule your marketing calendar in advance.

- Ensure you have a process in place for compliance review before scheduling.**

## Pro-tips:

- Osaic's preferred digital marketing platform vendors have built-in compliance workflows, meaning there are no secondary steps outside the system. Visit the Marketing Resource Center to learn more.
- A mix of evergreen, long-term content and time-sensitive, short-term content is ideal.
- Schedule email communications and social media posts in advance to maintain a consistent posting frequency.
- While content can be scheduled in advance, it is best to not schedule more than 30 days in advance. This will help ensure shared content is valuable, timely, and relevant.
- Include yourself and any pertinent staff in email distribution lists to know when your content is delivered.

Planning space:



# Website performance review and optimization

Now that you have a published and professional website reflecting your business, let's talk about continued website maintenance and optimization opportunities. You will want to conduct an initial performance review and optimize your website within 6 months after your launch. From there, continued maintenance and optimization should occur quarterly.

- Ensure Google Analytics is connected to your website to help identify the trends and patterns of how your visitors engage with your website. Features include data collection, monitoring, reporting, and to help you analyze details of your customer's website journey and improve your marketing ROI.**

Data collection



Monitoring



Reporting



Analysis



Marketing ROI

## Pro-tips:

- Keep in mind that the service industry varies from ecommerce in several ways, including key website statistics. Instead of focusing on a single percentage, observe the trends over time. For example, is your website traffic increasing month after month?
- Google Analytics is free of charge.

- Search Engine Optimization (SEO) is a critical component to ensuring you get the most out of your website by enhancing online visibility and rankings in search engine results pages, as well as driving organic traffic to your website.**

**Pro-tip:** To boost your SEO, it may help to think of your website as a living, breathing extension of your business. As with all living, breathing entities, they must be regularly fed and nurtured. Below are tactics to help you regularly “feed and nurture” your website and boost your SEO.

- Many financial professionals' websites initially include stock photos upon launch, however swapping these out with SEO friendly, custom images is a great place to start. Make sure custom photos are relevant to the subject matter.**
  - Custom photos can be taken by a professional photographer or by a photography enthusiast (such as yourself).

**Many of today's phone cameras can take high-quality photos.**

- Website speed is a critical factor in helping your page rank and gain traffic, so make sure to scale images appropriately to improve page load times.

**Pro-tip:** Use an online optimizer tool to reduce image sizes, such as Compress Now.

- Add and optimize image alt tags and titles with keywords to inform search engines what the photo includes.

**Pro-tip:** Hire a photographer or videographer for you and/or your team and bring multiple outfit changes. A good guideline is to have everyone bring a professional outfit for each season and take a collection of photos in or around your office and/or at nearby landmarks specific to your location. You will then have multiple team photos/videos that are ready to quickly be published and swapped out on your website each quarter.

**Create high-quality, relevant, and engaging written content that satisfies both your client and prospective client needs.**

- Consider the experience of your website visitors and streamline the navigation menu, making it easy for both clients and prospective clients to find what they are looking for.
- Identify relevant keywords and phrases your target audience is likely to use when searching for financial advice or services in search engines. Once identified, work to naturally include these keywords and phrases throughout your website copy. Keep in mind that keyword stuffing does not fool the algorithm and is detrimental to SEO.

**Pro-tips:**

- Use an online tool to help discover high-volume and low-competition keywords, such as Google Keyword Planner.
- Highlight any of the custom marketing material you've previously created such as self-authored written form, video, or podcasts.
- Increase website traffic by including your website link within your email marketing and social media content by creating content that connects back to your website.

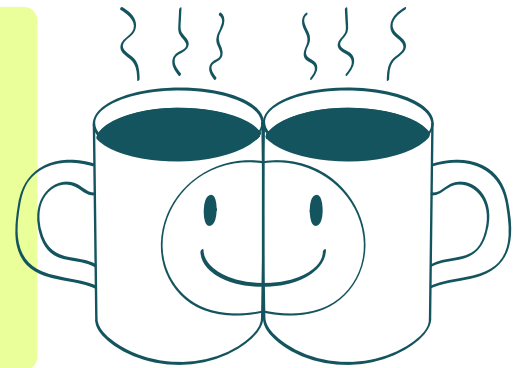
Planning space:



# Surprise and delight

One of the most effective ways to nurture client relationships and enhance customer loyalty is by implementing a “**Surprise and Delight**” process.

Surprise and Delight is a fun, distinct way to show your clients that you’re thinking about them and care about what’s important to them. The term Surprise and Delight refers to any thoughtful marketing or service action that aims to exceed client expectations by unexpectedly providing your client with a positive experience or benefit.



This can be achieved through unexpected gestures, gifts, or experiences that go above and beyond what clients would typically expect from a financial professional. Think of actions or gestures that would make your client(s) say, “WOW” in response. These WOW moments can be quite powerful, supporting loyalty, retention and encouraging new clients through referrals by creating a positive and standout experience.

- A popular Surprise and Delight touch point is a personal, handwritten birthday card mailed to clients on their birthday.**
- Rare and unique ideas are often based around a specific interest in a particular segment of your book of business. For example:** A financial professional with several dog lover clients could make a fun play on happy hour by hosting a live or virtual, “Yappy Hour.” Event attendees can bring their dogs to the event or have them join on screen for a memorable experience.
- Additional opportunities to consider: Surprise and Delight during office visits, life events, client/wedding anniversary, holiday, death of a loved one, get well wishes, etc.**
- Remembering and acknowledging specific and unique client preferences and interests help clients feel valued. For example, if a client prefers a specific beverage or soda, you could have it available when they visit you in the office for their annual review. Or if you have a group of travel enthusiasts within your book, send relevant and valuable articles regarding travel.**

## Pro-tips:

- When possible, offer surprise discounts or benefits, such as a special discount on your services or provide unique additional benefits. This unexpected value can be an exciting touch for your clients.
- Aim to deliver one Surprise and Delight experience for each client per year. Remember to segment your list to allow for budget, time management, and level of opportunity.



# Client events

A tier of surprise and delight is client events. Organizing exclusive events such as client appreciation, an open house, educational workshops, seminars, or networking mixers, where clients can connect with you and others in a more relaxed setting, is a wonderful way to nourish and create new connections. The key is to be genuine in your efforts and to the preferences and needs of your clients. Building strong relationships requires ongoing communication, personalized attention, and a commitment to their financial well-being.

## Pro-tips:

- If you are actively community-oriented, invite clients to participate with you in local events or charity initiatives.
- Check out the Advisor Marketing Team's top-performing Surprise and Delight guide, sharing hundreds of ideas and vendors, available on the Marketing Resource Center.

Planning space:



# Referral marketing

One of the most effective ways to acquire new clients is through referrals, as most of us tend to place a high level of trust on recommendations made by friends and family. If you opt to implement a referral program, set yourself up for success by setting SMART goals. As you may remember from the Marketing Checklist: Level 1, these ensure your goals are Specific, Measurable, Achievable, Relevant, and Time-bound (SMART). Below are examples of SMART goals:

- SMART goal: Generate 25 new leads by the end of Q2.**
  - NOT SMART: Collect more leads.
- SMART goal: Increase prospect email open rates by 20% by end of year.**
  - NOT SMART: Get more leads to open emails.

Track where your leads are coming from and follow them through the pipeline of your process. Some of the primary metrics that you will want to evaluate include:

- Referral rate**
- # of referrals**
- Conversion rate**
- Referral source**
- Cost Per Acquisition (CPA)**

## Pro-tips:

- You may want to offer a choice of reward incentives that appeal to clients and change them out occasionally. Ensure incentives are compliant with regulation requirements prior to implementation.
- A referral has a lower cost per acquisition than other channels, outside your current book.
- Check out your digital marketing platform for available referral campaign content.

Planning space:



# Ongoing measurement and refinement

At this phase of the marketing journey, ‘Measure/Tweak/Repeat’ is your ongoing mantra. As we learned in the Marketing Plan Checklist: Level 1, it’s critical to measure the determined key metrics and Key Performance Indicators (KPIs) most relevant to your specific marketing goals.

Continuous measurement and refinement allow you to adapt to changing market conditions, optimize resource allocation, capitalize on technology advancements, leverage customer feedback, and achieve your business goals more effectively.

As a reminder, metrics are designed to evaluate the performance of processes and activities. They tend to be more operational. Here are a few common examples below:

- Email open rate, click-through rate, and response rate**
- Google Analytics to track website metrics, such as website traffic by page** (additional information under “Website Performance Review & Optimization” section above)
- Social media engagement**
- Video engagement, and so on**

KPIs are metrics that measure performance based on specific goals, during a specific time period, and tend to be strategic. KPIs enable you to make informed decisions and improve outcomes. A few examples of KPIs include:

- Client acquisition rate**
- Revenue per client**
- Client retention rate**
- Assets under management, and so on**

**Pro-tip:** We recommend conducting a monthly review, or at the very least, quarterly. This will help to refine your marketing approach and avoid delays in achieving your goals.

Planning space:

# Congratulations!

You have completed the Osaic Marketing Plan Checklist: Level 2. We hope this guide has helped you gain a sophisticated understanding of the game-changing tools and critical tactics to elevate your marketing efforts and drive tangible results. As you continue to expand your reach and engage with your audience more effectively, remember to frequently analyze your data, refine your messaging accordingly, and adapt as necessary to further maximize your impact.

## What's next?

The Advisor Marketing Team would be honored to further support you and your marketing advancement through any one of our service offerings. Visit the [Marketing Resource Center](#) to learn more or email us at [marketing@osaic.com](mailto:marketing@osaic.com).

