

Marketing Strategy and Tactics Guide.

Below are common marketing strategies and tactics used by advisory firms. Start by watching the expert advice for best practices and to determine which strategy may make sense for you based on your skills, strengths & opportunities, and what has worked for you in the past.

STRATEGIES Your approach	POTENTIAL OBJECTIVES	EXPERT ADVICE Is this strategy right for you?	SAMPLE TACTICS & VENDOR LINKS Your actions	
Marketing Basics	> Lead Gen		> Set up & optimize your website for lead generation > Establish brand imagery, fonts, colors & copy	
Content Marketing	> Lead Gen > Awareness		> Social media > Blogging > Book author > Gated content	> Newsletter > Podcasting > Video
	> Support/Retain		 > Social media > Newsletter > Magazines	> Podcasting > Market commentary
Referral Marketing	> Lead Gen		> Client referrals > Client testimonials > Client gifting	> Center of Influence (COI) referrals
Event Marketing	> Lead Gen		> Virtual	> In-person
	> Support/Retain		> Virtual	> In-person
Media	> Lead Gen > Awareness		Paid: > Advertising > Sponsorships	Earned: > Featured/quoted > Top advisor lists
Networking / Social Selling	> Lead Gen > Awareness		> Network > Client testimonials	> Join targeted groups/boards > Volunteer
Outsource	> Lead Gen > Awareness > Support/Retain		> Hire a marketing partner > Curated content platforms > Paid lead services	