

FINANCIAL ADVISOR MARKETING QUIZ

Before investing time, effort, or dollars into your next marketing strategy, it's important to assess your existing marketing assets and current marketing activities. This quiz will walk you through an appraisal of every element required for an effective marketing plan.

- ◇ Do you have an annual marketing plan?
- ◇ Do you feel like your marketing accurately reflects your current brand?
- ◇ Are you tracking your business and marketing data so you can know what's working and what isn't?
- ◇ Have you clearly defined who your ideal client is?
- ◇ Have you mapped out your client journey from prospect to onboarding?
- ◇ Are you promoting your business on any social media networks other than LinkedIn?
- ◇ Are you posting to social media networks more than three times a week?
- ◇ Do you know what kind of content to post on your social media networks?
- ◇ Have you claimed your Google business profile and is it up-to-date?
- ◇ Do you or your business consistently show up in local online searches like Yelp.com, YellowPages.com, and Google?
- ◇ Are you consistently getting new prospective client leads?
- ◇ Is there an easy-to-find email signup box on your website with a compelling reason for visitors to provide their email address to you?
- ◇ Is your website modern and easy to use?
- ◇ Is your website ADA compliant?
- ◇ Do you have a comprehensive strategy in place for driving traffic to your website?
- ◇ Is your website properly optimized for search engines using search engine optimization (SEO) best practices?
- ◇ Do you use Google or Bing advertising?
- ◇ Do you use Facebook, Instagram, or LinkedIn advertising?
- ◇ Do you use video or audio marketing to strengthen your relationship with clients and prospects?
- ◇ Do you send email to your contact list at least once a month?
- ◇ Do you write thought leadership articles for online publications that are read by your ideal clients?
- ◇ Are you using all of your content to its fullest potential, ie, sharing it to social media, emailing it to your list, posting it to your website, optimizing it to be found by search engines, etc.?
- ◇ Do you have a marketing support person on your staff to implement marketing strategies?

TOTAL SCORE: _____



RESULTS

YOUR SCORE: 18-23

You're rockin' it with your digital marketing, but why stop now?

You've built an amazing foundation for your financial advisory firm but there's always room for improvement. With some fine tuning you can ensure you're an advisor who uses all things digital to maximize your potential to grow your business and your profits.

YOUR SCORE: 13-18

Your digital marketing meets typical baseline standards, but you're not ready to settle for average are you?

The right actions and focus can turn your so-so marketing into remarkable marketing that positions your financial advisory firm as a modern, well-respected brand online to support everything you're doing in real life.

YOUR SCORE: 7-12

You're making strides with your digital marketing and there's still work to do.

Let's take it from competent to clear, confident, and seriously successful. Now's the time to get started on making changes where they are needed so you have a digital presence that stands out and helps you and your financial advisory firm meet your goals.

YOUR SCORE: 0-6

Don't worry, while your result is a D, we can have that D stand for DECISION.

Now is the time for you to make the important decision to step up your marketing game for your financial advisory firm. Just imagine where you could be a year from now by making the decision to take action.

YOU HELP YOUR CLIENTS REACH THEIR GOALS, NOW LET US HELP YOU.

At Crystal Marketing Solutions, we've been helping independent RIAs and LPL financial advisors achieve business growth with results-oriented custom marketing strategies since 2011.

Our Marketing Roadmap can give you an in-depth audit of your online presence, digital marketing, and marketing collateral as well as a fully customized, step-by-step plan for implementing marketing strategies that get results.

THE MARKETING QUIZ YOU'VE JUST COMPLETED IS THE PRECURSOR TO YOUR ROAD MAPPING PROCESS.

WOULD YOU LIKE TO EXPLORE THE NEXT STEP?



CLICK HERE TO SCHEDULE YOUR INTRODUCTORY CALL

