

The Financial Advisory Firm's Roadmap

Establishment

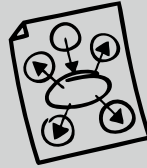
Develop brand

- o Identify and share core values
- o Mission and Vision – differentiating your firm
- o Internal marketing – all aboard



Profile ideal clients

- o Marketing plan to attract them



Acquire clients

- o Marketing campaign activities
- o Sales training

Build professional connections

- o Adding value
- o Expert knowledge



Develop service offerings

- o Value and pricing
- o Delivering excellent service



Acquisitions

- o Brand strategy - old versus new to retain clients
- o Communication plan – aim of client retention
- o Opportunity growth – through development of client relationships
- o Stimulate inactive clients



Spot opportunities for niche marketing

- o Identify new propositions
- o Marketing plan to launch them

Increased capacity – more advisers

- o Grow client base
- o Establish a referral strategy
- o Ensure service standards embedded so as not to lose clients



Growth

Maintenance

Strategic options

- o Evaluate options



Review positioning

- o Brand review – does it reflect quality?
- o Improve the brand experience

Ongoing client communications

- o Plan the right level and type of contact
- o Review client touch points contributing to the brand experience



Continue to build professional connections

- o Use your specialisms to collaborate
- o Joint communications and seminars

Market Research

- o Are you truly delivering what people want?
- o Review and amend your propositions accordingly

Succession Planning

- o Manage client relationships to boost relationships with the firm



Sense check

- o Are the current offerings fit for purpose in the market?



Generational planning

- o Safeguarding income for the business as dependents inherit wealth



Evaluate Future Options

- o Management buy out
- o Making the business attractive to purchase



Future Proofing

MISCHIEVOUS
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