



1. Establish Your Target Market

Identifying your target market is key to customer acquisition because even with all of the marketing efforts in the world if you target the wrong people, you will not grow your clientele. Find your target market by identifying your ideal client's age, net worth, location, persona, and needs.

2. Get Your Name Out There

It's difficult to acquire customers when they aren't aware of your brand. Make sure your website looks appealing and professional while having good SEO. Then, drive traffic to your website by using Google Analytics and linking your website on your social media pages.





3. Reward Loyalty

Client's like to feel important. A great way to do this is by sending personalized gifts or cards to your clients. Gifts and cards remind your clients that you have them at the forefront of your mind and value their business.

4. Build Trust + Credibility

To attract new clients, it's crucial that prospects feel that they can trust you, not only as an advisor but also as a person. You can build this trust by using seminars as a platform to show off your advising knowledge and your personality. Include personal sentiments during your seminars to connect with the audience emotionally.



5. Utilize Content Marketing

Use content marketing to stay at the forefront of prospects' minds, so when they decide to invest with an advisor that advisor is you. Also, content marketing is impactful throughout the entire customer acquisition funnel, so it's relevant to you at any time of the year. Spending money on content marketing is a smart investment, and many advisors know this, don't fall behind.

6. Use Omni-channel Marketing

Maximize conversion rates by utilizing all marketing channels. Engaging prospects across multiple channels will help you to fulfill your marketing objectives. Direct mail initially piques the interest of prospects, then digital advertisements serve as a reminder for prospects to signup for your event.





7. Brand Your Marketing

Make sure all of your marketing efforts properly reflect your brand. Your direct mail should share the same colors as your brand and have your company's logo. If you have a solid Facebook page, consider using it for your digital ads. Make sure your brand speaks for itself throughout your entire campaign process.

8. Storytell

During your events, it's critical to tell a compelling story because prospects are more likely to remember a captivating story than bullet points on a slideshow. Stories are a great way to create interest and stay in the minds of prospects even after they leave.





9. Analyze + Adjust

After each campaign or marketing effort you do, analyze the results! This helps you to see what's working and what areas of your marketing plan need improvements. Identifying and improving these areas will sculpt a strong marketing plan and ultimately increase your customer acquisition.

10. Don't Forget Digital

Many advisors believe that digital marketing won't make a significant difference in conversions for their campaigns. However, an internal study found that campaigns that utilized both direct mail and digital marketing had 35% more conversions.





Get in Touch

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