



Build Your Marketing Engine. Then scale it.

How to go from reactive to results-driven marketing.

Nicole Smith, CEO//Founder, [Socialisd.com](https://socialisd.com)

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What to expect

01 Who this is for

02 What we'll cover today

03 How this helps your practice

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About Me

I'm Nicole Smith,
a marketing tech nerd
who loves storytelling.



- **30 years** in financial services
- Expert in **social media** and copywriting since 2008
- Coaching clients since **2010**
- Gift for business **storytelling**
- Crafted over **50,000** organic social media posts for our clients
- Understand the importance of **standing out** in a crowd
- Marketing = the '**client experience**'

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The role of marketing in a modern advice practice.

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**“Financial businesses with
consistent pipelines grow 60%
faster.”**

Source: The Financial Brand's studies on growth in financial advisory firms.

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Attract high-calibre clients.



Strengthen the quality of your client experience beyond the initial meeting



Communicate proactively with referral partners to strengthen your pipeline



Demonstrate the ongoing value of advice (and justify your fees)



Position your firm as innovative, client-centric, and forward-thinking



Attract high-calibre team members aligned with your values



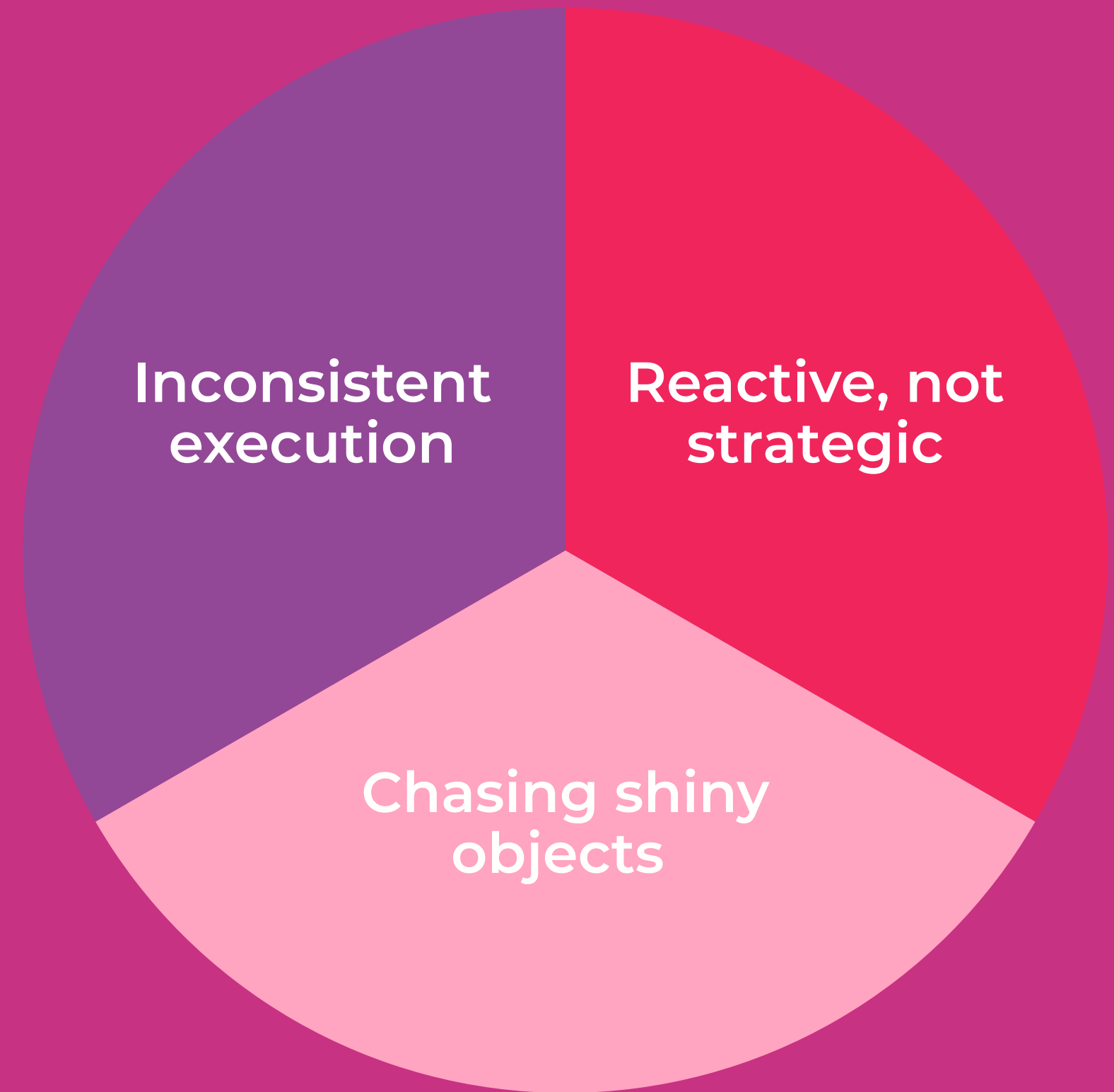
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What holds marketing back - and how to **fix it.**

Let's talk about the
elephant in the room:

Most advice
businesses do not
have a functioning
**marketing
engine.**





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The Marketing Engine Framework.

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“Instead of one-way interruption, web marketing is about delivering useful content at just the right moment that a buyer needs it.”

[David Meerman Scott, Keynote Speaker & Author]

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The **Buyers** Journey.



Awareness

Content Marketing

Visit Website

Curiosity



Interest

Blog Posts, Infographics

Subscribe to Newsletter

Engagement

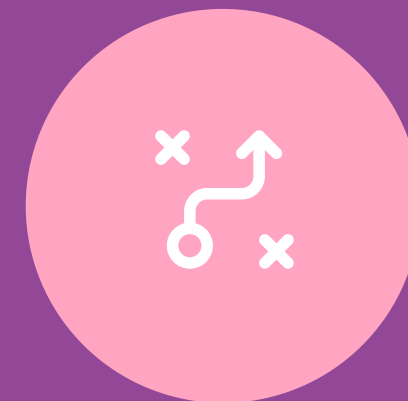


Consideration

Email Campaigns

Download Whitepapers

Evaluation



Decision

Case Studies

Request meeting

Confidence



Purchase

Become a client

Refer you to others

Satisfaction

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Attract:
— Visibility
that drives
opportunity.

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**“Good marketing makes the
company look smart. Great
marketing makes the customer
feel smart.”**

[Joe Chernov]

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**Brand recall
is built on
repetition and
relevance.**

**The average consumer needs
to see a brand 7–15 times
before it even registers in
their memory.**

01 **Understand your ideal client**

Psychographics, not just demographics.

Attract doesn't mean blast out a bunch of content and hope.

It means showing up consistently where your ideal client is already spending time, doing so with empathy and clarity.

02 **Where do they direct their attention?**

Understand the places you can find them or they can find you.

Know the social platforms that will work the best for your clients, your business and the content you produce.

Then create the content that gets the results.

03 **Always lead with value**

Educational content,
SEO, social, PR.

Think short, value-packed videos, blogs answering common client questions, and podcast guest appearances.

This is when you begin thinking about how to deliver value, where someone is incentivised to stay **connected**.



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Nurture:
**Build trust
before the
first meeting.**

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“People will forget what you said. They will forget what you did. But they will never forget how you made them feel.”

[Maya Angelou]

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**Nurturing is
about being
visible in the
gaps between
touchpoints.**

When someone connects
via the website or books a
call, what happens next?

Ideas

Offer a valuable resource.

Automated email sequences.

Tell client stories.

Behind-the-scenes videos.



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Convert:

**Make it
easy to
say yes.**

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**“When you speak to everyone,
you speak to no one.”**

[Meredith Hill]

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01 **Conversion is about clarity.**

Your website should clearly say:

- who you help
- how you help
- what happens next

⁰² Most potential clients don't act because they're confused.

Financial advice is something new - maybe the first time they have ever considered getting advice.

They don't know what they need, they won't pick an adviser and they don't trust website forms.

03 Becoming a client is an impressionable period.

What is your discovery and onboarding process like?

You never want buyers regret creeping in. Sharpen it up.



Retain +
Refer

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Retain +

Refer:

**The growth
multiplier.**

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“People don’t buy the best products. They buy the ones they can remember.”

[Donald Miller, Building a StoryBrand]

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Retention and referrals aren't luck. They're a system.

- Post-meeting surveys
- Quarterly check-in emails
- Value-add videos
- Asking for Google reviews at the right time
- Feedback loops for referrals
- Communication and clients to 'look out for'

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Case Study:

‘Fancy Wealth Partners’.

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A bit about them...

- 3 advisers, 1 paraplanner, 2 admin staff, all in-office
- Established 10 years ago, mostly grown via word of mouth and referrals
- They want to scale without burning out, attract better-fit clients, and build a more visible brand
- No internal marketing resource, but the team is open to being involved
- They've dabbled in social media, and send the odd quarterly newsletter... but that's about it
- A mid-sized financial advice firm with big growth plans - but no real marketing engine (yet)



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Building Your Marketing Engine: **The Foundations**

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ATTRACT - Get visible + find aligned clients

- Developed a **content strategy** based on 3 core content pillars:
 - Retirement clarity
 - Business owner advice
 - Women and wealth
- Created a **lead magnet** for email sign-ups
- Published at least one **blog** post per month
- Shot simple smartphone **videos** with team members (1 per month) on commonly asked questions, which were edited into Reels and carousels



ATTRACT - Get visible + find aligned clients

- Team members were coached on **sharing** this content with their networks - especially on LinkedIn
- Result: their top adviser's post about retirement planning got 22 comments and 6 opportunities for discussions - 2 of which converted to real advice appointments

Scaling idea: Add a podcast, with rotating adviser hosts, and invite strategic referral partners or aligned professionals as guests.



NURTURE - Stay front-of-mind + deepen trust

- Implemented a **monthly** email strategy:
 - **Clients:** educational + timely (e.g. EOFY super strategy tips)
 - **Referral** partners: value-driven with updates, case study snippets and 'who we help' clarity
- Created one anchor piece of content per month (a blog or video), repurposed into:
 - 5–7 social posts
 - email copy
 - slides for webinars or workshops



NURTURE - Stay front-of-mind + deepen trust

- Setup an **email nurture sequence** for new enquiries:
 - Talking about what the first meeting might be like
 - Highlighting client stories and social proof
 - Clear CTA for a strategy call or what to bring to the first meeting

Scaling idea: Launch a quarterly webinar series and use recordings in email automation or funnels.



CONVERT - Turn interest into commitment

- Created a clear **value ladder**:
 - Free survey lead magnet - provides data and talking points
 - \$500 consult fee (low-commitment entry point)
 - Full service advice package
- Added a clear 'Work With Us' page with **video walkthrough**
- Masterclass **webinar** to support the sales process
- Implemented a '**Book a 15-min chat**' call-to-action across the website, social content, and email footer

Scaling idea: Use retargeting ads to re-engage website visitors and abandoned leads with case study-driven messaging. **socialisd.**



RETAIN/REFER - Strengthen pipeline + build loyalty

- **Monthly** email:
 - 'What's been happening' section
 - Client stories
 - Educational updates
 - Team profiles
- Created a **referral partner toolkit** with:
 - 'Who we work with' one-pager
 - Video from the CEO
 - FAQ sheet to build confidence in introductions



RETAIN/REFER - Strengthen pipeline + build loyalty

- Every adviser was encouraged to **share** 1 piece of content per week that signals credibility and shows personality
- Setup a **quarterly team content workshop** - team members share what clients are asking and turn it into future content

***Scaling idea:** Automate client milestone touchpoints (e.g. 6-month review email with video, happy birthday SMS, etc.) to deepen relationships.*



You don't need to do everything to get traction - you need to do the right things in the right order based on your capacity, goals, and team.

Build one solid **system**. Then **layer**.
Then **scale**.



“Change before you have to.”

[Jack Welch, Chairman and CEO General Electric]

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Thank you!

If you want clarity, we offer a free **30-minute strategy call** where we map out what's working, what's not, and where to focus first.

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