



Digital Marketing Implementation Guide for Financial Advisors

Terry Martin



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Digital Marketing Implementation Guide for Financial Advisors

is now possible to execute your own marketing as never before. The purpose of this ebook is to help you lay the foundations for your campaign without using an agency.

A maximum of 30 minutes should be spent completing the worksheet at your first attempt; just complete the parts that you can.

Forward your completed guide to terry@wrigitail.com and then book a free strategy call using the link below. During the call I will optimise your marketing plan and provide you with access to the resources you need for execution. I can cater for all marketing budgets.

<https://calendly.com/wrigitail/30min>

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Executive Summary

Key Points

Market Overview

The financial advisory landscape is rapidly shifting toward digital channels. Advisors who implement structured digital marketing strategies in 2025 will have a significant competitive advantage.

Investment Required

Minimum viable budget: time only

Time commitment: 5-10 hours/week

Implementation timeline: 3-6 months

Expected ROI timeline: 2-4 months

Channel Options & Results

LinkedIn As A Service: Fastest results (1-2 clients from month 1)

LinkedIn Organic Content: Sustainable growth (2-4 clients per quarter)

Facebook Ads: Lowest long-term cost per lead after optimization

Google Ads: Highest conversion rates (30-40%)

LinkedIn Ads: Best for high-net-worth targeting

AI Video Messaging: High engagement, personal touch

Implementation Strategy

Start with one primary channel

Master fundamentals before scaling

Track and measure all results

Optimize before expanding

Expected Outcomes

Month 1-2: System setup and initial leads

Month 3-4: Consistent lead flow and first clients

Month 6: Optimized performance and predictable results

Why This Guide Matters for Your 2025 Marketing

The financial advisory landscape is becoming increasingly digital. This guide uses the SOSTAC® framework to help you create a clear, actionable marketing plan that works.

What is SOSTAC®?

Think of SOSTAC® as your GPS for marketing:

Situation: Where are you now?

Objectives: Where do you want to go?

Strategy: What's the best route?

Tactics: What specific tools will you use?

Action: Taking the journey

Control: Staying on track

Why This Works for Financial Advisors

Clear structure: No guesswork about what to do next

Practical steps: Real actions you can take today

Measurable results: Track what's working

Flexible approach: Adjust as needed

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1. Introduction & Channel Overview

Available Digital Marketing Channels

Channel
Comparison Matrix:



Channel	Base Cost	Optional Management	Timeline	Expected Results
Linkedin As A Service	\$2,000/mo	N/A	Month 1	1-2 clients/month

Channel	Base Cost	Optional Management	Timeline	Expected Results
LinkedIn Organic	Time only	Optional	3-6 months	2-4 Clients / quarter
Content marketing				
Facebook Ads	\$2,000 /mo	\$3,000/mo	6 months	2-4 clients/month
Google Ads	\$2,000 /mo	\$3,000/mo	2-3 months	2-3 clients/month
LinkedIn Ads	\$3,000 /mo	\$4,500/mo	3-4 months	1-3 clients/month

Channel		Base Cost	Optional Management	Timeline	Expected Results
AI	Video Messaging	\$1500/ mo	n/a	2-3 weeks	1-2 clients/mon

Performance Metrics by Channel:

Channel			Initial Cost/Lead	Optimized Cost/Lead	Conversion Rate
LinkedIn Service	As	A	N/A	N/A	20-30%
Facebook Ads			\$70-150	\$30-50	15-25%
Google Ads			\$100-200	\$80-150	30-40%
LinkedIn Ads			\$150-300	\$120-250	25-35%
AI Messaging	Video		N/A	N/A	20-30%
Linkedin Organic			Time based	Time-based	1% of engaged

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2. Situation Analysis

Current Position Assessment

Business Metrics:

☐ Number of current clients:

☐ Assets Under Management:

\$ _____

☐ Monthly revenue:

\$ _____

☐ Average client value:

\$ _____

Digital Presence:

☐ Website visits/month:

☐ LinkedIn connections:

☐ Email list size:

☐ Online reviews (avg):

Current Marketing Activities:

Chan.

Monthly
Cost

Monthly
Results

R O I

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Target Market Analysis

Primary Market Demographics:

- ☐ Age range: _____
- ☐ Income level: \$ _____
- ☐ Professional background: _____
- ☐ Investment minimum: \$ _____
- ☐ Geographic focus: _____

Secondary Market Demographics:

- ☐ Age range: _____
- ☐ Income level: \$ _____
- ☐ Professional background: _____
- ☐ Investment minimum: \$ _____
- ☐ Geographic focus: _____

Competitive Analysis

Local Market Position:

Competitor	AUM	Target Market	Digital Presence
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_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Your Differentiation:

- ☐ Unique value proposition: _____
- ☐ Service specialization: _____
- ☐ Target market niche: _____
- ☐ Geographic advantage: _____

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3. Objectives Setting



6-Month Business Goals

Client Acquisition:

- ☐ New clients target: _____
- ☐ Client retention rate: _____
- ☐ Average client value: \$ _____
- ☐ Total AUM growth: \$ _____

Revenue Targets:

- ☐ Monthly revenue goal: \$ _____
- ☐ Revenue increase (%): _____

☐ Fee structure changes: _____

☐ New service offerings: _____

Digital Marketing Metrics:

☐ Monthly leads goal: _____

☐ Conversion rate target: _____

☐ Cost per acquisition target: \$ _____

☐ ROI target: _____

Channel-Specific Objectives

Primary Channel: _____

☐ Monthly lead target: _____

☐ Conversion rate goal: _____

☐ Cost per client target: \$ _____

☐ Timeline to achieve: _____

Secondary Channel: _____

☐ Monthly lead target: _____

☐ Conversion rate goal: _____

☐ Cost per client target: \$ _____

☐ Timeline to achieve: _____

Implementation Timeline

Month 1 Goals:

Month 3 Goals:

Month 6 Goals:

Success Metrics Dashboard

Initial Benchmarks:

Metric	Current	3-Month Goal	6-Month Goal
Leads	_____	_____	_____
Clients	_____	_____	_____
Revenue	_____	_____	_____
ROI	_____	_____	_____

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4. Strategy Selection

Channel Evaluation System

Each channel is scored 1-5: 1 = Poor fit/not suitable 2 = Below average fit 3 = Average fit 4 = Good fit 5 = Perfect fit

Channel Selection Worksheet

LINKEDIN AS A SERVICE

Budget fit (can you afford \$2,000/month?): _____

☐ Time availability (30 mins/day available?): _____

☐ Target market match (professional audience?): _____

☐ Technical capability (basic LinkedIn knowledge?): _____

Total Score: _____



LINKEDIN ORGANIC CONTENT MARKETING

- ☐ Time availability (5 hours/week minimum?): _____
- ☐ Content creation capability (daily posting?): _____
- ☐ Network size (250+ connections?): _____
- ☐ Engagement capability (daily interaction?): _____

Total Score: _____

FACEBOOK ADS

- ☐ Budget fit (can you afford \$2,000+ monthly?): _____
- ☐ Time availability (or budget for management?): _____
- ☐ Target market match (mass affluent focus?): _____
- ☐ Technical capability (ad platform knowledge?): _____

Total Score: _____

GOOGLE ADS

- ☐ Budget fit (can you afford \$2,000+ monthly?): _____
- ☐ Time availability (or budget for management?): _____
- ☐ Target market match (search intent focus?): _____
- ☐ Technical capability (Google Ads knowledge?): _____ Total Score: _____

LINKEDIN ADS

- ☐ Budget fit (can you afford \$3,000+ monthly?): _____

☐ Time availability (or budget for management?): _____

☐ Target market match (high-net-worth focus?): _____

☐ Technical capability (ad platform knowledge?): _____

Total Score: _____

AI VIDEO MESSAGING

Budget fit (can you afford \$500+ monthly?): _____

☐ Time availability (2-3 hours/week?): _____

☐ Target market match (receptive to video?): _____

☐ Technical capability (basic video comfort?): _____

Total Score: _____

Channel Scoring Summary

Channel	Total Score	Rank	Notes
LinkedIn As A Service	_____	_____	_____
LinkedIn Organic	_____	_____	_____
Facebook Ads	_____	_____	_____
Google Ads	_____	_____	_____
LinkedIn Ads	_____	_____	_____
AI Video Messaging	_____	_____	_____

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5. Tactical Implementation

30-Day Launch Plan

WEEK 1: SETUP

- ☐ Create/optimize all accounts
- ☐ Install tracking
- ☐ Prepare basic assets
- ☐ Set up team access

WEEK 2: BUILD

- ☐ Create first campaigns
- ☐ Set up lead capture
- ☐ Establish follow-up process
- ☐ Test all systems

WEEK 3: LAUNCH

- ☐ Start campaigns
- ☐ Monitor performance
- ☐ Make initial adjustments
- ☐ Begin lead follow-up

WEEK 4: OPTIMIZE



- ☐ Review first results
- ☐ Adjust targeting
- ☐ Optimize budget
- ☐ Scale what works

Weekly Task Checklist

Monday:

- ☐ Review weekly metrics
- ☐ Check budget spend
- ☐ Plan weekly activities

Wednesday:

- ☐ Mid-week performance check
- ☐ Adjust campaigns as needed
- ☐ Follow up with leads

Friday:

- ☐ Weekly performance review
- ☐ Plan next week's activities
- ☐ Team progress update

Resource Requirements

Budget:

Item	Monthly Cost
Primary Channel	\$_____
Secondary Channel	\$_____
Management (if needed)	\$_____
Total	\$_____

Time Investment:

Activity

Hours/Week

Campaign Management

Lead Follow-up

Team Meetings

Total

Weekly Actions

Review Numbers:

- Leads generated: _____
- Appointments set: _____
- Cost per lead: \$_____
- Content engagement: _____ (if using organic)
- Network growth: _____ (if using organic)

Campaign Check:

- Budget spent: \$_____
- Performance ok? Y/N
- Adjustments needed? Y/N
- Content performance: _____
- Engagement rate: _____%

Follow-up:

New leads contacted? Y/N

Follow-ups completed? Y/N

Appointments confirmed? Y/N

Content scheduled? Y/N

Network engaged? Y/N

Monthly Review

Quick Stats:

Metric	Target	Actual
New Clients	_____	_____
Revenue	\$_____	\$_____
ROI	_____%	_____%
Engagement Rate	_____%	_____%
Network Growth	_____	_____

Health Check:

☐ Costs within budget?

☐ Leads converting?

- ☐ Strategy working?
- ☐ Content performing?
- ☐ Network growing?

Actions Needed:

Next Month's Focus:

- ☐ Primary goal: _____
- ☐ Budget: \$ _____
- ☐ Target leads: _____
- ☐ Content focus: _____

Notes:

Review Date: //____

Quarterly Performance Review

Channel Performance Summary:

Channel	Investment	Returns	ROI	Continue Y/N
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_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Strategic Adjustments:

- ☐ Budget reallocation needed?
- ☐ Channel mix optimal?
- ☐ Content strategy working?
- ☐ Network growth on track?
- ☐ Lead quality sufficient?

Next Quarter Targets:

- ☐ New clients: _____
- ☐ Revenue growth: \$ _____
- ☐ Network size: _____
- ☐ Engagement rate: %
- ☐ Cost per client: \$

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Taking Action: Your Path Forward

Implementing Your Digital Marketing Strategy

Key Takeaways

Channel Selection

- Start with one primary channel that best matches your:
 - Budget capacity
 - Time availability
 - Target market
 - Technical capabilities
 - Content creation ability
- Add secondary channels only after optimizing your primary channel

Investment Strategy

- Begin with minimum viable budget
- Focus on learning and optimization first
- Scale what works, stop what doesn't
- Track ROI meticulously
- Factor in time investment for organic strategies

Implementation Timeline

First 30 Days:

- Focus on proper setup
- Build strong foundations
- Test and measure everything
- Start small and controlled
- Establish content rhythm if using organic

60-90 Days:

- Optimize based on data
- Refine targeting/content
- Adjust messaging
- Scale successful elements
- Build network engagement

6 Months:

- Establish consistent performance
- Consider adding channels
- Build on what works
- Maintain measurement discipline
- Evaluate organic growth metrics

Success Factors

1. Consistency over perfection
2. Data-driven decisions
3. Regular monitoring and adjustment
4. Strong follow-up systems
5. Clear success metrics
6. Content quality and engagement
7. Network growth and nurturing

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Next Steps

Immediate Actions:

- Complete situation analysis
- Set clear objectives
- Choose primary channel
- Create implementation timeline
- Develop content strategy

First Week:

- Set up tracking systems
- Prepare basic assets
- Establish team roles
- Begin implementation
- Start content calendar

1. Regular Reviews:

- Weekly metrics check
- Monthly performance review
- Quarterly strategy assessment
- Annual planning
- Content effectiveness analysis

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Final Recommendations

1. Focus on Fundamentals:

- Start with one channel
- Master before expanding
- Track everything
- Stay consistent
- Create valuable content

1. Maintain Flexibility:

- Adjust based on data
- Respond to market changes
- Scale successful elements
- Learn from results
- Adapt content strategy

1. Keep Long-term Perspective:

- Build sustainable systems
- Focus on ROI
- Maintain client quality
- Plan for growth
- Develop thought leadership



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**Your Next
Action:**

- Email your completed guide to terry@wrigitail.com (including your name)
- Book a free strategy call using the link below.

[https://calendly.com/](https://calendly.com/wrigitail/30min)

[wrigitail/30min](https://calendly.com/wrigitail/30min)

Review Date: //____

Notes:





About This Book

Finally, a clear roadmap for financial advisors who want predictable client growth. This comprehensive guide shows you exactly how to attract and convert high-value clients using proven digital channels. Get practical, actionable guidance on:

- Which marketing channel best fits your practice
- How to generate 2-4 new clients monthly
- When to expect ROI from each strategy
- Step-by-step implementation plans
- Real performance metrics and benchmarks

Stop guessing about digital marketing. Get the proven blueprint that's already working for financial advisors. Download now and start growing your practice with confidence.