



# 5 TIPS TO MARKET YOUR BRAND

No Matter Where You're Starting Out.



**Silver Oak  
Securities**  
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Firms are facing an increasingly competitive market landscape, making it more and more difficult to stand out from the crowd. And with customer preferences shifting to expect more personalized outreach, firms are forced to re-evaluate what they deliver, and how they communicate it, to meet investors where they are.

But for many financial professionals, embracing this “new normal” doesn’t feel natural. Adding a marketing hat to their existing duties can feel like an entirely new challenge — one made more overwhelming by the many obstacles and challenges of the past few years.

The truth, though, is that marketing your brand and showcasing your unique value is more important than ever. We’re here to help. Here are our top tips for marketing your brand, regardless of where you’re starting.

# 1

## DEFINE YOUR BRAND STORY

Your brand story captures your value — why you're the best option for your clients (both existing and potential). The story you tell will become the foundation of your marketing strategy, so the first step is to get your story straight.

But what exactly is your "brand value?" You might be thinking something along the lines of, "I provide financial advice" or "I'm trustworthy and experienced." While those statements might be true, they don't provide insight into why you're different from your competitors.

Your brand value should:

- Be highly specific and unique
- Align with your audiences' needs
- Differentiate your brand from competitors





Here are a few questions to ask yourself to start building the foundation of your brand value:

- *What qualities make your business unique?*
- *What services demonstrate those qualities?*
- *Who would benefit from that experience?*
- *What will they gain from working with you?*
- *What makes this matter?*

The story you ultimately write should be featured across your website, social media profiles, presentation decks, advertising, email and phone messaging, and more. In other words, your brand story should become the foundation of every touchpoint with a lead, prospect, or client. Consistency is key when creating a memorable brand story and showcasing your brand value.

## 2 EVALUATE AND BUILD YOUR ONLINE PRESENCE

The digital world is here to stay. In fact, it's likely we'll start seeing the digital landscape grow despite the return to physical workspaces and events.

But even as new platforms and marketing strategies emerge, your firm doesn't need to juggle them all at once. The key is to focus on where your audience "lives" and invest in digital marketing strategies in those locations.

Building your online presence starts with setting a solid foundation, which almost always means making a website. A good website is intuitive, easy to navigate, mobile-friendly, and — most importantly — clear on your brand promise.



Once your website is established, you can start to build out your digital presence through essential distribution channels, including:

- Content marketing
- Email marketing
- Social media

Finally, you can also include more advanced, tactical digital strategies that empower stronger connections with your audience. Adding marketing automation, digital ads, PPC, SEO, and affiliate marketing where appropriate maximizes your digital brand reach and increases lead generation while driving more conversions.

### 3 ALLOW DATA TO DRIVE DECISION MAKING

Data empowers you to make better decisions about how you connect with your customers and what services or offerings you provide. Analytics give you valuable information about clients and prospects so you can create more effective marketing and sales communications. With data and analytics, you can:

- Personalize messages and content for a stronger impact with prospects, and clients
- Determine the best channels to market your brand and distribute content
- Craft a stronger brand story and message that resonates with your audience
- Gain insights into where your prospects are in the buying process
- Determine marketing ROI to get the most bang for your buck
- Make better decisions about the future of your marketing and outreach



But implementing analytics can also leave you with a lot of information you don't know what to do with. The metrics you track should be unique to your firm's goals and challenges, but here are four basic metrics you should be tracking and how:

- 1 **Reach/Engagement By Channel:** Number of clients or prospects your content or marketing materials have reached, separated by channel
- 2 **Prospective Client Opportunities:** Number of prospects you engage with through marketing who move on to engage in sales conversations
- 3 **Customer Acquisition Cost:** Total investment in marketing and sales divided by the number of new clients acquired within a specific timeframe
- 4 **Net Promoter Score:** Client willingness to recommend you based on a 1-10 scale

Investing in marketing technology can help make data more accessible so you can better understand which marketing tactics are most effective.





## 4

## VIEW MARKETING TECH AS A BUSINESS PARTNER

Technology is no longer a nice-to-have, it's a no-brainer for growth-minded financial professionals. With the right marketing tech, you can market more efficiently and drive better outcomes. But with over 8,000 marketing tech platforms available, knowing what is worth your money can feel overwhelming.

To choose marketing tech that will support your business goals and help you achieve sustainable growth, you want to first identify where your existing gaps are. Are you struggling to stay active on social media? Do you need help scoring leads or managing lead nurture flows? Once you have an idea of where you need tech support, you can find a tool that fills those gaps.

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**Look at marketing tech as a partner, not just a supporting tool.**

## 5 ASK FOR HELP WHEN YOU NEED IT

Taking on marketing responsibilities can feel overwhelming when you have a dozen other tasks on your plate. Luckily, there is a wide range of resources available to help you master your marketing.

Know when a problem is out of your depth. Turning to an expert for help can allow you to focus on what you do best while ensuring your issue is tackled correctly the first time. Investing in external support keeps productivity high while avoiding further complications and headaches.





## YOUR (BRAND) VOICE MATTERS HERE

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At Silver Oak, we're dedicated to providing independent financial professionals with all the resources they need to grow their businesses - including marketing support, technology, client communication tools and compliance assistance with promotional materials.

Learn more about how Silver Oak champions the spirit of the independent financial professional [here](#).



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