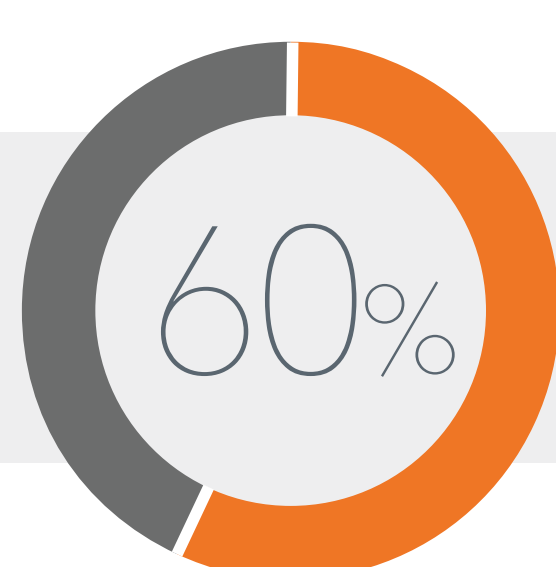


# Optimize your client acquisition strategy

Your prospective clients are in control. They can easily search online, compare options and determine the right Financial Advisor for their needs. But will the right prospects find—and choose—you?



**Percentage of marketers who say that inbound marketing generates the highest quality leads<sup>1</sup>**

Follow this six-step inbound marketing plan to increase your visibility, capture more qualified leads and win new business.

## 1 | Define your best prospects with precision

Ensure you use precise details to define your ideal prospect.

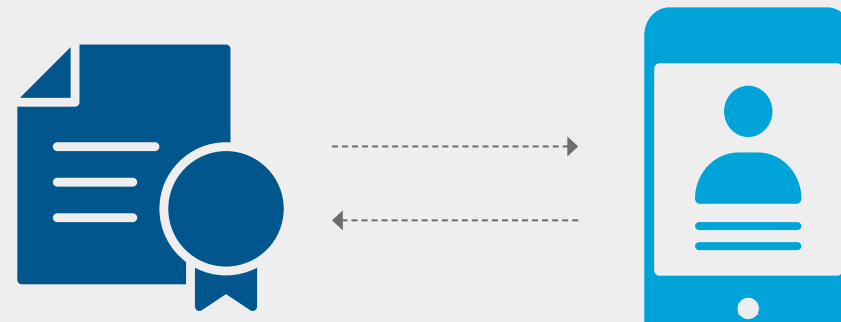
- Look beyond net worth. Determine life stage, marital status, profession, age range and more.
- Hone your value proposition with this refined definition in mind.



## 2 | Focus on what matters most to them

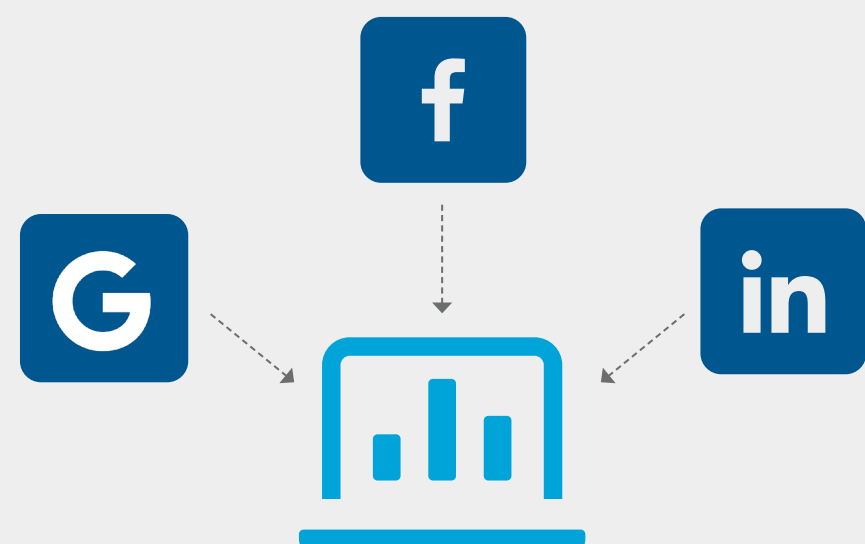
Use high-value content to generate and convert leads.

- Identify prospects' top-of-mind concerns, such as retirement planning, market volatility, business succession planning, etc.
- Produce or procure content to educate them around these key needs.
- Offer this content in exchange for personal information to help qualify your leads.



## 3 | Engage prospects digitally to drive traffic

Strategically architect campaigns to reach your defined audience.



- Leverage proven paid and non-paid digital tools, including Google display ads, Facebook ads and search engine optimization.
- Feature your premium content—not your business—in your ads.
- Drive prospects to your website with these targeted campaigns.

## 4 | Optimize landing pages for conversion

Once you've generated website traffic, get prospects to raise their hands.

- Feature your premium content.
- Use specific, compelling language that highlights how that content will help your prospects solve a problem.
- Require prospects to provide some basic personal information in exchange for this valuable premium content.



## 5 | Use data to prioritize and engage your leads

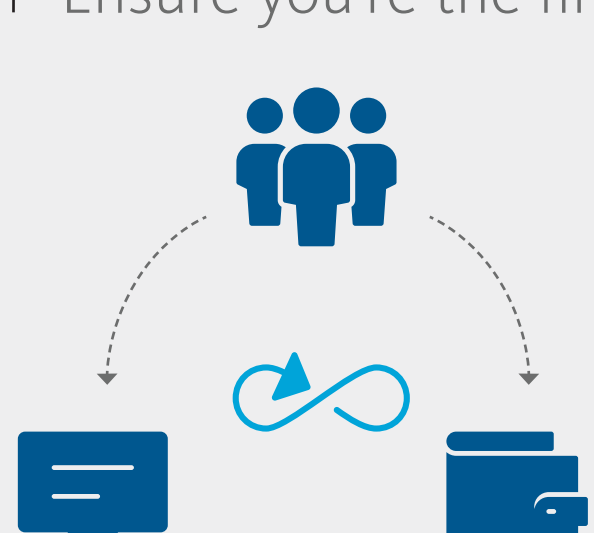
Take the prospect information you collect to the next level.

- Enrich prospect profiles with investment, behavioral and demographic data to gain insight into their needs, goals and motivations.
- Identify the prospects that are the best fit for your practice.
- Focus your efforts on this freshly refined audience.

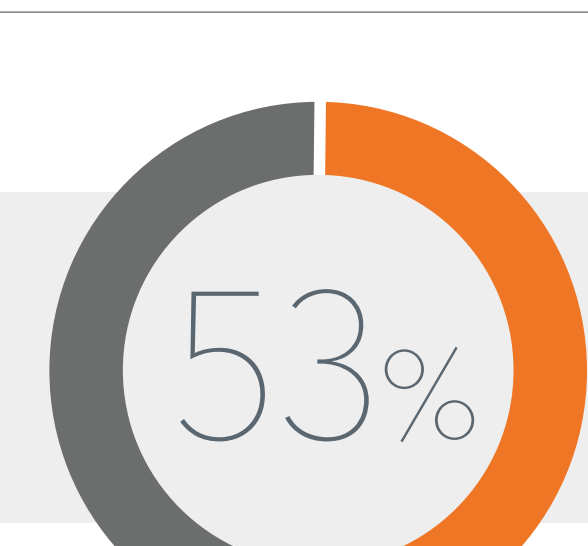


## 6 | Measure, optimize, repeat

Ensure you're the firm that your best prospects find—and choose.



- Continuously analyze results and fine-tune messaging to achieve even greater conversion rates.
- Keep your pipeline filled with promising prospects.
- Build and maintain a more profitable book of business.



**Percentage of marketers who see higher ROI from inbound marketing tactics<sup>2</sup>**

## Market smarter. Win more business. Broadridge can help.

Our uniquely comprehensive wealth marketing toolkit provides rich data, engaging content, and intelligent technologies that help you:

- **ATTRACT** top prospects with targeted campaigns
- **SHARPEN** insights with data-driven analytics
- **PERSONALIZE** connections with relevant content
- **ENHANCE** effectiveness with automated campaigns
- **ACCELERATE** revenue growth



SOURCES <sup>1</sup>HubSpot Research: State of Inbound 2018 Global Report. <sup>2</sup>Ibid.

## Ready to take the next step?

Contact your Broadridge representative today: 855-252-3822

Broadridge, a global fintech leader with \$4 billion in revenue, provides communications, technology, data and analytics solutions. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.