

## MARKETING DIAGNOSTIC RESULTS REPORT

# Acquire Clients

Acquiring clients is a priority for your firm. There are a variety of marketing strategies and tactics to grow your client base depending on your marketing goals and the time and resources you are able to allocate. This section evaluates your activities in three primary areas: Identifying Prospects, Generating Referrals and Converting Prospects. It outlines where you should focus your attention and specific tactics you may wish to consider as you work to acquire new clients for your firm.

### IDENTIFY PROSPECTS



Your firm does a reasonably good job of identifying prospects, but there are a number of additional strategies that you can use to build your pipeline of prospective clients and institutionalize a process to follow-up on leads in a consistent and timely manner. The tactics outlined in the table can help you incorporate this strategy into your marketing and business development plan. [Learn more](#) ▶

### GENERATE REFERRALS



Your firm has taken some steps to generate referrals from clients and/or intermediaries. However, there are a number of ways you might improve your approach. The tactics outlined in this table can help you maximize the referrals you generate. [Learn more](#) ▶

### CONVERT PROSPECTS



Converting prospects to clients is not a challenge for your firm; however, you may wish to review advisor best practices to support your continued success in this area. [Learn more](#) ▶

## Tactical Assessment and Recommendations

### SUCCESSFUL TACTICS

- [Pitchbooks/Capabilities Presentations](#)

The tactics outlined to the left have proven effective at helping your firm acquire new clients. As you refine your marketing and business development plan, we recommend you continue using these tactics as long as they help you meet your growth goals and are aligned with your marketing budget and available resources. Click on any of the tactics for more information.

### TACTICS TO CONSIDER

Consider the following marketing tactics as you're building your marketing and business development plan. Use the links to learn more about each of them.

TACTICS	ASSESSMENT	LEARNING RESOURCES
<b>Intermediary Newsletters – Used, but Ineffective</b>	You've sent newsletters to intermediaries such as CPAs or attorneys in the past, but did not consider this tactic to be effective. Creating relationships with these centers of influence can take time. Newsletters should be used in tandem with other communications to make referral sources aware of your firm's services as well as how you will follow-up on referrals they send your way. Use the links at the right to learn how to create effective newsletters and build an intermediary referral strategy.	<ul style="list-style-type: none"> <li><a href="#">Intermediary Referrals Newsletters</a></li> <li><a href="#">Evaluating Your Newsletter Checklist</a></li> <li><a href="#">Sample Print Newsletter</a></li> <li><a href="#">Sample E-Newsletter</a></li> <li><a href="#">Third-Party Resources [Newsletter/Article Writing Services]</a></li> </ul>