

# How to Use Automated Marketing for More Nurtured Leads & Guaranteed Growth



## What is Marketing Automation, and Why Does it Matter?

Marketing automation is a software-based platform that helps automate specific types of marketing activities for a business. HubSpot offers a great definition:

*“Marketing automation is software that handles routine marketing tasks without the need for human action. Common marketing automation workflows include email marketing, behavioral targeting, lead prioritization, and personalized advertising.”*

Marketing automation is an essential tool that every financial advisor should be utilizing to make their marketing efforts easier while also saving time.

By adding automation to your marketing strategy, you can effectively deliver relevant messages and information to leads, nurturing them throughout the sales process. And because you are presenting your prospects with consistent content you will be able to track what works and what doesn't and improve your marketing efforts overall.

In this post, we'll explain the importance of marketing automation for today's financial advisor, explain how to get started if you are new to automating your marketing efforts, and provide a few tips if you've already begun automating your marketing campaigns.

# How to Get Started with Marketing Automation for Financial Advisors

## 1. Choose an Automation Platform

In the past, marketing automation almost exclusively referred to email marketing campaigns that revolved around various actions a potential client may or may not take with an email that reached their inbox. Very little good data could be gleaned from this strategy, and success relied solely on the volume of leads generated, not on the quality of the leads being turned over to the sales team. This would result in a poor experience for both the prospects and for the financial advisor trying to gain new clients.

In today's world, marketing automation must revolve around the needs of your prospects, across all of your marketing channels — not just email. The best and most successful marketing automation software will rely less on email and instead will communicate with your contact lists in multiple ways. The feedback received from this cross-channel approach provides businesses with data they can use to better satisfy their potential clients' wants and needs.

## 2. Identify Your Target Audiences

That's right: *audiences*, plural. Marketing automation will allow you to present a more personalized message to the contacts in your CRM. Create segments across your prospect list by focusing on various parameters, such as:

- **Demographics:** The big ones, like age, gender, income, education, industry, etc.
- **Platforms:** Crafting content that is specifically suited for a particular social media channel, email, text, or regularly published newsletters.
- **Interests:** Respond to site or page visits with user-informed content. If a prospect has clicked on links or content related to retirement investments, follow up with messaging related to retirement planning, rather than real estate investments.
- **Engagement:** Ensure you are building a relationship with repeat visitors, utilizing data captured from previous interactions.

Personalized and efficient communications will strengthen the quality of your leads, keep these prospects in your sales funnel, and ultimately improve your

conversion rate for servicing new clients.

### **3. Create and Implement Your Marketing Strategy**

The newest automation software platforms, such as **Redtail Campaigns**, provide financial advisors with workflow templates that guide the user through the process of scheduling and sequencing your messages, emails, and posts. These templates are invaluable as time savers and are a great way to test the limits of your marketing automation platform's capabilities.

Customizing your marketing automations allows you to anticipate and respond to virtually any combination of responses or actions your prospect may take. A few examples to consider include:

- Send a welcome email when somebody fills out a contact form on your website, joins a group you manage, or follows you on social media.
- Send a thank you message to individuals who view a video presentation or register for a webinar you sponsor. Include links to related information to further your value and position of expertise.
- Reach out to old leads you have been saving in your CRM, providing updates on your business, including links to your scheduling platform.

Most importantly, take the time to create a marketing plan, and get started. Like Winston Churchill famously said, "Perfection is the enemy of progress."

### **4. Track Your Results (Good and Bad)**

The speed and efficiency that marketing automation provides to your business can be a blessing and a curse. Despite the urge to react to the results you may see initially, it is important to remember that the marketing and sales race is a marathon, not a sprint. Patience will be rewarded with stronger leads and better clients. By taking the time to review the analytics and detailed reports your automation software can create, you can improve your knowledge and understanding of who your future clients are, and how to best earn their business.

By creating the kind of content that your prospects want, rather than what you *thought* they wanted, you will continue to grow your brand and your customer base.

## Next Steps

Marketing automation software is a near-necessity for a growing business in today's evolving marketplace. By empowering financial advisors to improve marketing processes and increase brand awareness in-house, automation allows you to have more control over the growth and success of your business.

When considering marketing automation tools and platforms, **Redtail Campaigns** will help you get started on the path to more nurtured leads and guaranteed growth through custom, pre-built content, powerful workflows, and a direct integration into the Redtail CRM. Learn more, [here](#).

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