



---

# Financial Services Marketing Checklist

Create a Marketing Strategy to  
Turn Leads Into Loyal Clients

# The financial services industry is one of the most competitive industries in the world. Is your marketing strategy helping you gain a competitive advantage?

Incredible advances in technology have changed the way financial institutions attract clients. Without a strong, efficient marketing strategy in place, your services may be thrown to the wayside in favor of other businesses that know how to effectively speak to their ideal audience.

But how do you implement a killer marketing strategy? The first step is to understand your clients. What do they want, what is convenient for them, and what are the solutions you provide that make their lives easier?

In the following checklist, you'll discover whether your financial marketing strategy is working for you or against you. Answer these answers honestly and discover what areas you're performing well in, what areas you can improve on, and how to optimize your marketing strategy to help you bring in and retain more clients.

## Review Your Business

---

### What are your "remarkables"?

- ☐ What makes your company stand out?
- ☐ Are you showing how you're different from your competitors?

## Review Your SEO

---

### Is your website set up so search engines (and potential clients) can find you?

- ☐ Are you using keyword-rich headlines?
- ☐ Do you have clear title tags and meta descriptions for each page?
- ☐ Do all of your images have keywords in their alt-text?

## Review Your Website

---

### What do your visitors see?

- ☐ Is your website usable on all devices, aka mobile-friendly?
- ☐ Do you have compelling images and videos showing proof of your success with current clients?
- ☐ Are you highlighting your team members?
- ☐ Do you have helpful resources for clients and prospects?
- ☐ Do you have any awards, certifications, or relevant industry partners visible on your site?

## Review Your Social Media

---

### Are you active on social media?

- ☐ Do you have a strong presence on Facebook, LinkedIn, Instagram, and other platforms?
- ☐ Are you asking for reviews for social proof?
- ☐ Are you showing examples of your services and proof of your successes on social media, directing people to your website?

## Review Your Content

---

### What are you offering that's helpful to your visitors?

- ☐ Do you have conversion points throughout your site, offering a download or more information that has value for your visitor?
- ☐ Do you have a blog?
- ☐ Do you explain your processes on your website?
- ☐ Are you using video?
- ☐ Do you have case studies highlighting your clients' successes?

### Do you have a content strategy?

- ☐ Have you identified the keywords your ideal clients are using to find your services?
- ☐ Do you know what keywords present the best opportunity for you to rank higher?
- ☐ Does your content answer the questions your customers and prospects ask the most?

# Review Your Other Online Profiles

## Is your business found in online directories?

- ☐ Is your Google Business Profile claimed and complete?
- ☐ Are you asking for Google reviews to show on your Google Business Profile?
- ☐ Are you listed on relevant financial industry resource directories?
- ☐ Are you listed on vendors' websites as a recommended partner?

## Want more than a self-guided checklist?

Reach out to us. We'll assess your digital presence and offer you personalized recommendations with no strings attached.

**FREE 1:1 MARKETING CONSULT**



**LAIRE®**

704-561-1975 | [www.lairedigital.com](http://www.lairedigital.com)