

LPL Marketing Consulting

ADVISOR MARKETING SCORECARD

EDUCATE | INSPIRE | ELEVATE



ADVISOR MARKETING SCORECARD

Give yourself one point for each statement you agree with, zero points if you disagree or are unsure.

VALUE PROPOSITION:

- My firm has a well-thought-out value proposition.
- Our value proposition differentiates us in the marketplace.
- Every member of our team is aware of and can articulate our value.
- We have a well-defined target market.
- Our value proposition/mission statement is clearly stated on our website.

TOTAL: __/5

WEBSITE:

- Our website uses responsive design.
- The URL or website address is secured, i.e., begins with “https://”.
- The images used on our website reflect our value proposition.
- Our content speaks to our defined target audience.
- All information is up to date.
- Team bios and recent photos can be easily found.
- It’s easy for clients to access their account information/log into Account View.
- Visitors can sign up for our email newsletter.
- We feature educational content.
- We feature unique content (e.g., an original blog, video content, etc.).

TOTAL: __/10

EMAIL AND SOCIAL MEDIA:

- We send a regular email newsletter.
- We have a social media presence (Facebook, LinkedIn, and/or Twitter).
- Links to our social media pages are prominently featured on our website.
- We are active on our social media pages (post at least once per week on each platform).
- We regularly engage with others on social media (likes, comments, shares, hashtags, and @mentions).

TOTAL: __/5

ASSESS YOUR SCORE

0-5

NEEDS IMPROVEMENT

Devote time to working on these fundamentals, starting with your value proposition and working your way through each section. Contact Marketing Consulting for guidance and support.

5-10

ROOM TO GROW

Focus on the areas where you scored the lowest, starting with value proposition and working through the missing elements of each section.

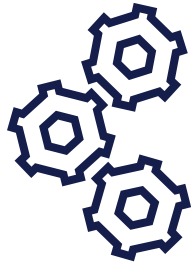
10-15

PRETTY GOOD!

Review any missing elements and spend time working on these areas. When you're ready, be sure to reach out to LPL Marketing Consulting, to schedule a marketing consultation to review your marketing strategy.



WE'RE HERE TO HELP



MARKETING CONSULTING SUPPORT

Contact Marketing Consulting for guidance and support along the way:
Call (800) 877-7210, Option 9, Option 5, Option 1, or ask.marketing@lplfinancial.com.

MARKETING SOLUTIONS

Interested in outsourcing your marketing activities to the experts? Contact Marketing Solutions to learn more: <https://www.lplbusinesssolutions.com/discover-marketing>.

