CRAFT IMPACT

A GROWTH & COMMUNICATIONS AGENCY

RIA Marketing & Communications Checklist

RIA Marketing & Communications Checklist

Whether you are starting an RIA or running an established financial independent practice, you know you are doing what is best for you and your clients. Let's make sure everyone understands why.

Use this checklist to build a strategic marketing and communications plan to retain clients and attract new prospects.

Create Branding, Messaging, and Visual System Guidelines

- [ ] Develop value proposition messaging for your target audience
- [ ] Moodboard visual ideas
- [ ] Company name
- [ ] Typography
- [ ] Color scheme

Build Website

- [ ] Domain name (www.yourcompanyname.com)
- [ ] Hosting platform (Wordpress, HubSpot, SquareSpace, etc.)
- [ ] Search Engine Optimization (SEO) Audit & Strategy
- [ ] Write Website Copy & Content
    - [ ] Home
    - [ ] Welcome Video
    - [ ] Who We Serve
    - [ ] Services
    - [ ] About Us
    - [ ] Contact Us
- [ ] Create Website Analytics Reports
    - [ ] Traffic
    - [ ] Conversions
    - [ ] Engagement

Create Sales Collateral PDFs

- [ ] 1-pager About Us
- [ ] Client Success Map(s)

Audit, Evaluate, & Setup Tech Stack

- [ ] CRM Software
- [ ] Email Marketing Software
- [ ] Sales Tools

Create Transition Announcement Communication Strategy (new RIAs)

- [ ] Personal brand development (LinkedIn)
- [ ] Written email templates
- [ ] Phone call scripts & talking points
- [ ] Video announcement
- [ ] Social media campaign
- [ ] Client benefits presentation

CRAFT IMPACT
A GROWTH & COMMUNICATIONS AGENCY

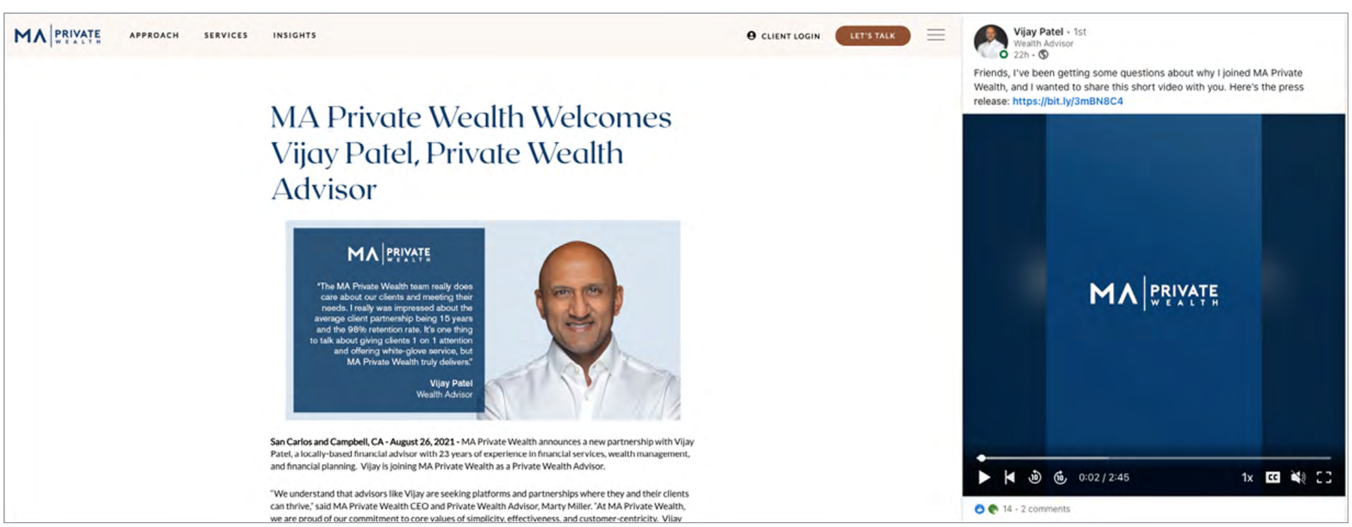
Samples to Inspire You

Compelling Messaging and Branding

Sales Collateral

New Website

Announcement Communications and Press Releases



CRAFT IMPACT

A GROWTH & COMMUNICATIONS AGENCY

It’s time to modernize your marketing with a custom plan, personalized for your independent practice.

Elevate your business, fuel more referrals, and increase net flows with marketing and sales strategies tailored to your practice.

Get in Touch