

2025

ADVISOR MARKETING

FIELD GUIDE

2025 is a turning point for financial firms. This guide equips you with bold strategies, actionable insights, and scalable tools to help your team cut through the noise, engage clients, and achieve sustainable growth.



PRESENTED BY **SNAPPY KRAKEN**

The 2025 Marketing Landscape: What Your Advisors Are Up Against

Evolving Client Expectations

Clients today demand more than financial guidance. They expect personalized, transparent communication delivered at the right time and tailored to their unique needs.

Emerging Trends for Future-Proof Firms

- **Data-Driven Personalization at Scale:** Use AI to create hyper-targeted experiences that build trust and loyalty. *Fact: 80% of consumers prefer businesses offering personalized experiences (Epsilon, 2023).*
- **Integrated Tech Stacks:** Disconnected tools slow firms down. A unified system streamlines workflows and ensures consistent branding and messaging. *Fact: The average employee wastes 4 hours per week switching between disconnected tech applications (Harvard Business Review, 2022).*
- **AI-Enhanced Insights:** Leverage analytics to predict client needs, optimize campaigns, and surface opportunities for growth. *Fact: Firms using AI tools report 22% higher lead-to-client conversion rates (Kitces Research, 2024).*

The Sea of Sameness

The explosion of AI-generated content has flooded the market with generic messaging, making it harder for advisors to stand out. Firms must lean into bold, authentic marketing to break through the noise and connect with clients in meaningful ways.

Proven Strategies for Growth in 2025

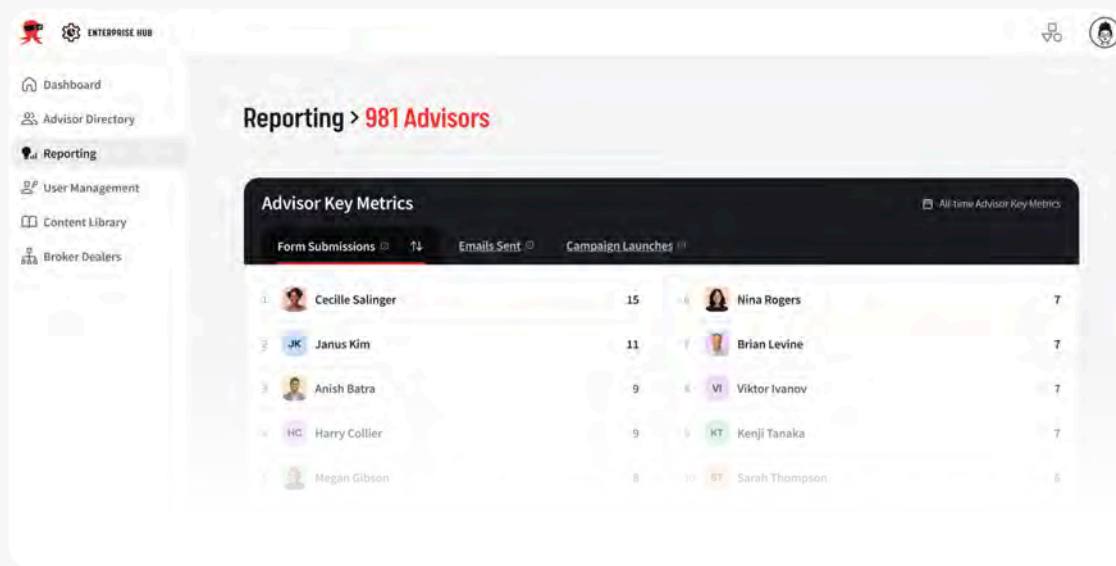
To succeed in this dynamic environment, your marketing must be proactive, client-focused, and supported by the right tools. Here's how to make it happen:

STRATEGY 1

Boost Advisor Engagement with Activation Tools

Low advisor adoption is a common hurdle for larger firms. Without engagement, even the best marketing tools won't deliver results.

- **How to Solve It:** Address adoption challenges by fostering a culture of engagement. Recognize and celebrate top-performing advisors to inspire others, share actionable best practices across the network, and provide clear guidance on using available tools effectively.
- **Snappy Kraken Solution:** Our Advisor Key Metrics dashboard makes it easy to identify top performers, uncover what's driving their success, and share those insights firm-wide. Paired with automated workflows, our tools ensure every advisor has the support and data they need to stay engaged and succeed.



Snappy Kraken Advisor Key Metrics dashboard

STRATEGY 2

Integrate Marketing Systems for Efficiency and Scale

Disconnected systems create bottlenecks, inefficiencies, and inconsistent client experiences. For larger firms, the stakes are even higher—fragmented tools waste time, complicate workflows, and make it harder to scale effectively.

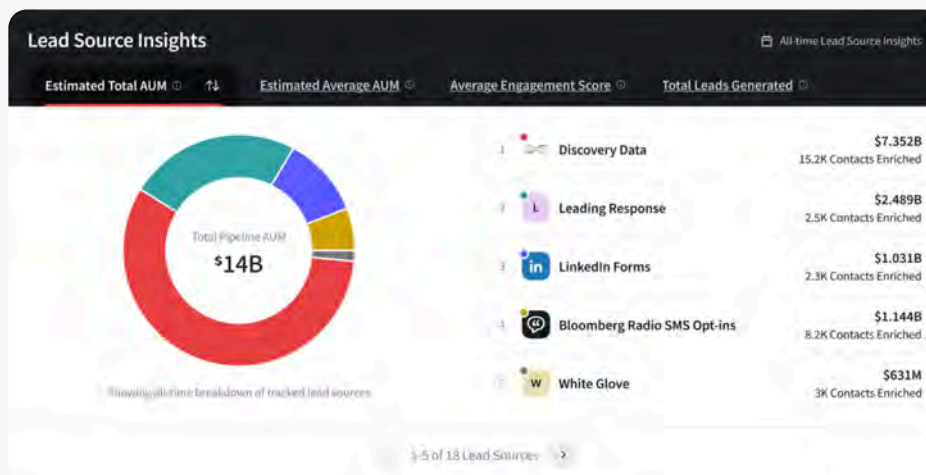
- **How to Solve It:** Streamline your operations by integrating content, automation, analytics, and compliance into a single system. A unified platform reduces inefficiencies, ensures consistent branding, and empowers your team to focus on high-impact activities.
- **Snappy Kraken Solution:** Our centralized tools bring everything together—content, automation, analytics, and compliance—into one seamless platform. This enables firms to scale their marketing operations, deliver personalized outreach, and eliminate the inefficiencies caused by disconnected systems.

STRATEGY 3

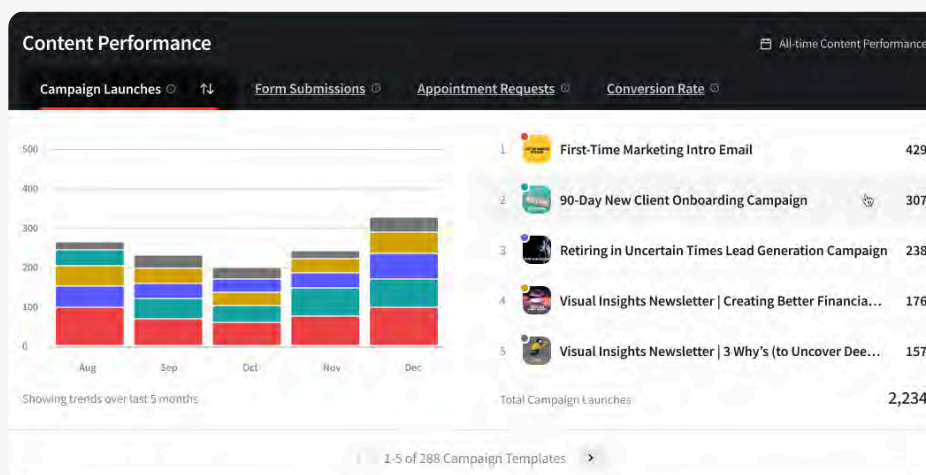
Use Data to Drive Better Content Performance

Lack of clear data on what's working—and what's not—leaves firms guessing when it comes to marketing decisions. Without actionable insights, it's nearly impossible to refine strategies, replicate success, or drive meaningful growth. For many firms, this results in stagnation, with average organic growth rates stuck at just 2–3% annually (Evestnet, 2024).

- **How to Solve It:** Leverage content performance dashboards to track key metrics like campaign launches, engagement rates, and conversions. With clear insights, firms can identify their top-performing strategies, refine underperforming campaigns, and focus resources where they'll have the greatest impact.
- **Snappy Kraken Solution:** Our performance analytics tools provide a complete view of your marketing efforts—tracking every campaign, engagement, and conversion. By surfacing actionable insights, Snappy Kraken empowers firms to optimize their strategies and achieve measurable, sustained growth.



Lead Source Insights Panel



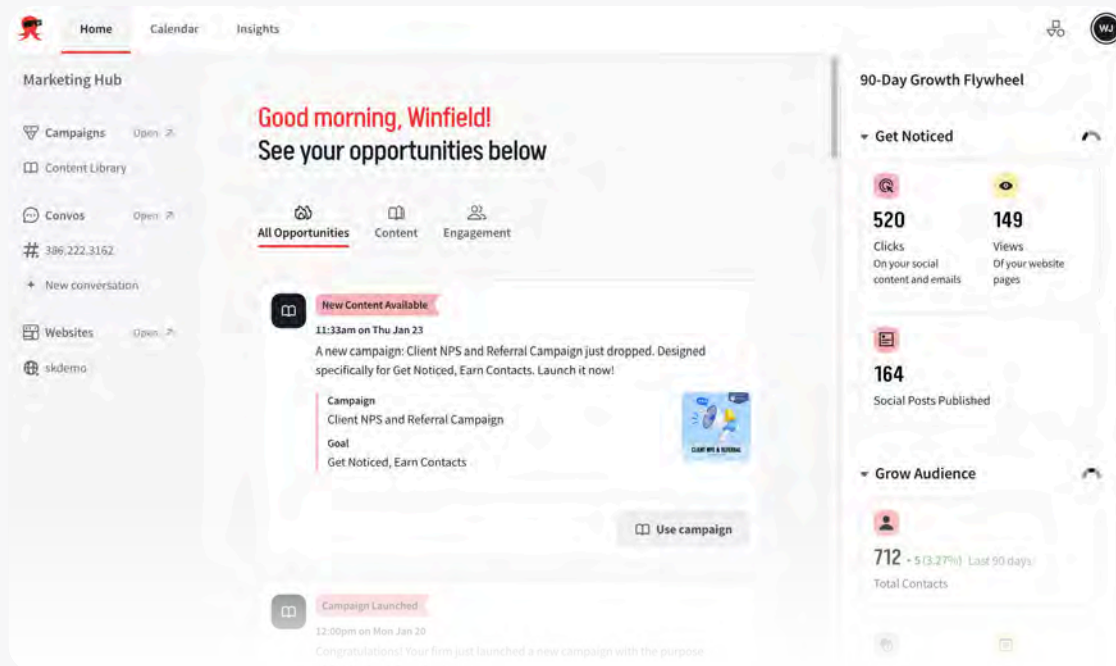
Content Performance Panel

STRATEGY 4

Leverage AI-Enhanced Marketing Tools

Scaling marketing efforts without sacrificing authenticity is one of the biggest challenges firms face. Without the right tools, firms risk losing opportunities, falling behind competitors, and overwhelming their teams with manual processes. AI offers a solution, enabling firms to capture leads, personalize outreach, and automate workflows at scale—while still maintaining the human touch clients expect.

- **How to Solve It:** Use AI to streamline key marketing functions, from capturing leads automatically to analyzing data for smarter, more personalized campaigns. Effective AI tools help firms identify opportunities, reduce manual work, and deliver timely, relevant messaging that resonates with clients. *Fact: Firms using AI tools report 22% higher lead-to-client conversion rates (Kitces Research, 2024).*
- **Snappy Kraken Solution:** Our AI Lead Capture Inboxes automatically turn lead notification emails into actionable contacts, seamlessly integrating them into ongoing nurture campaigns without manual setup. Paired with the Marketing Hub's AI-powered analytics, firms can surface top opportunities, personalize campaigns at scale, and ensure no lead falls through the cracks. Together, these tools empower firms to drive growth efficiently while maintaining authenticity in every interaction.



Marketing Hub dashboard

STRATEGY 5

Measure and Optimize for Continuous Improvement

You can't improve what you don't measure. Tracking the right metrics ensures your firm stays agile and impactful.

- **Key Metrics for Larger Firms:**
 - **Advisor Engagement:** Measure adoption rates and tool usage across your network.
 - **Campaign Performance:** Track launches, form submissions, and conversion rates.
 - **ROI:** Evaluate how marketing efforts drive growth.
- **Snappy Kraken Solution:** The intuitive dashboards in our Enterprise Hub provide actionable insights, giving firms the data they need to optimize strategies and achieve better outcomes.



Dive Deeper into AI and Generative Marketing Best Practices

For a comprehensive list of actionable AI prompts, expert tips on leveraging generative AI, and additional strategies tailored for individual advisors, check out the **2025 Advisor Marketing Field Guide: Advisor Edition**.

This companion resource is designed to help advisors create impactful, authentic content and make the most of their marketing tools—perfect for empowering your team.

[Click here to download the Advisor Edition](#) to share with your team.



2025: Your Year to Thrive

Winning in 2025 means embracing bold strategies, leveraging unified systems, and using data-driven insights to scale effectively. By implementing these approaches, your firm can empower advisors, engage clients, and achieve unmatched growth.

Snappy Kraken is here to help.

[Book a demo today](#) to unlock the tools and strategies your firm needs to succeed.

