

2025

# ADVISOR MARKETING



FIELD GUIDE



2025 is a turning point for financial advisors. This guide equips you with the bold strategies, emerging trends, and powerful tools you need to cut through the noise, engage clients, and thrive in a rapidly changing market.



PRESENTED BY **SNAPPY KRAKEN**

# The 2025 Marketing Landscape: What You Need to Know

## Evolving Client Expectations

Clients today demand more than sound advice—they expect personalized, transparent, and tech-savvy communication that reflects your firm’s authenticity and values.

### Game-Changing Trends You Can’t Ignore

- **Hyper-Personalization:** Use client data to craft experiences that feel unique and personal—boosting referrals and building stronger client relationships. *Fact: 80% of consumers prefer businesses that offer personalized experiences (Epsilon, 2023).*
- **Omnichannel Engagement:** Consistent presence across email, video, and social platforms ensures you’re always top of mind. *Fact: Omnichannel strategies boost client retention by 91% year-over-year (Aberdeen Group, 2024).*
- **AI-Driven Insights:** Leverage AI to predict client needs, optimize campaigns, and deliver timely, relevant messaging. *Fact: 75% of marketers using AI report improved client satisfaction (Salesforce, 2023).*

### Bold, Authentic Marketing in the Age of AI

With the rise of generative AI, the volume of generic, automated content has exploded. To stand out in this “sea of sameness,” firms must embrace bold, authentic messaging that reflects their unique voice and values.



# Proven Marketing Strategies for 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: Embrace Bold, Authentic Marketing

Cut through the noise of generic content with striking design and messaging that highlights your firm's distinct personality and core values.

- **Stand Out in the Sea of Sameness:** Use bold designs, unique branding, and authentic storytelling to capture attention.
- **Leverage Video:** Humanize your firm with short, personal videos that connect emotionally with clients. **Fact: Video content increases conversion rates by 86% on landing pages (Wyzowl, 2024).**

**How Snappy Kraken Helps:** With bold creative designs and easy-to-use video tools, you can convey authenticity and build trust effortlessly.

### Personal Connection Video Campaigns





## Strategy 2: Leverage Behavioral Finance Content

Behavioral Finance (BeFi) content helps clients make better financial decisions by addressing emotional triggers and offering reassurance.

- **Build Trust Through BeFi Content:** Tackle client fears and anxieties proactively with educational, empathetic messaging.
- **Engage Consistently:** Use frequent touchpoints to guide clients through uncertainty and build confidence in your advice. *Fact: Consistent, high-quality content generates 67% more leads (DemandMetric, 2024).*

*How Snappy Kraken Helps: Our BeFi content library is tailored to address client concerns while reinforcing your role as a trusted guide.*

### BeFi Campaign Example

## 5 Common Behavioral Biases







### Strategy 3: Streamline Growth with Technology

Disconnected tools and manual processes slow down growth. Modern firms need integrated systems that deliver efficiency and scalability.

- **Automate Lead Nurturing:** Build trust, win clients, and boost ROI with long-term, automated follow-up campaigns that engage prospects and foster relationships.
- **Deliver Data-Driven Results:** Use analytics to refine messaging and maximize ROI. *Fact: Advisors with streamlined tech stacks see a 22% higher lead-to-client conversion rate (Kitces Research, 2024).*

*How Snappy Kraken Helps: Our platform combines automation, analytics, and compliance tools to help you scale without sacrificing the personal touch.*



### Strategy 4: Measure What Matters

You can't improve what you don't measure. Focus on these metrics to track progress, optimize performance, and boost marketing ROI:

- **Engagement Rates:** Monitor email opens, clicks, and video views to gauge client interest.
- **Lead Conversion:** Measure how effectively you're turning prospects into clients.
- **ROI:** Understand the direct impact of your marketing investments on revenue growth. *Fact: Advisors leveraging advanced analytics tools see significantly higher ROI (HubSpot, 2024).*

*How Snappy Kraken Helps: Our intuitive dashboard offers clear, actionable insights to help you make data-driven decisions.*





## Strategy 5: Use AI Strategically

AI is revolutionizing marketing, but its real power lies in thoughtful application—amplifying your human expertise and driving smarter, data-driven strategies.

### Generative AI for Creativity and Efficiency

- **Ideation and Refinement:** Use generative AI to brainstorm fresh ideas, refine messaging, and jumpstart content creation—saving time without compromising authenticity.

*Example:* Quickly generate outlines, rewrite drafts, or explore alternative ways to communicate complex ideas.

### AI-Enhanced Marketing Tools for Data-Driven Personalization

- **Intelligent Lead Scoring:** AI-powered lead scoring analyzes client behavior to identify and prioritize your most promising opportunities. By focusing on the leads most likely to convert, firms can optimize their marketing efforts and drive better results.
- **Personalization at Scale:** Automate highly targeted campaigns that feel personalized for each client, using AI-driven insights to match the right message to the right audience. **Fact: Firms leveraging AI-enhanced marketing tools report 22% higher lead-to-client conversion rates (Kitces Research, 2024).**

**How Snappy Kraken Helps:** *Our platform combines the creative power of generative AI with data-driven tools like the Marketing Hub. By surfacing opportunities through intelligent lead scoring and automating personalized outreach, Snappy Kraken empowers you to scale your marketing while maintaining the human touch that clients value most.*



# 5 AI Prompts for Financial Advisors

## Email Campaign Creation:

“Write a professional email introducing [topic, e.g., financial planning for new parents] to my clients, emphasizing [specific benefit or emotional connection, e.g., peace of mind].”

## Social Media Ideas:

“Generate 3 engaging social media post ideas to explain [topic, e.g., the importance of retirement planning] in a way that connects with [specific audience, e.g., Gen X professionals].”

## Video Script Draft:

“Write a 1-minute video script to explain [financial concept, e.g., compound interest] in simple, relatable terms, using a conversational tone.”

## Blog Outline Generation:

“Create an outline for a blog post about [topic, e.g., navigating market volatility] with an introduction, 3 actionable tips, and a closing call-to-action.”

## Content Repurposing:

“Rewrite this [existing content type, e.g., email or blog excerpt] into a LinkedIn post targeting [audience, e.g., young professionals starting their investment journey].”



## Bonus Prompt: *Unlock the Power of Rewriting*

### Prompt:

“Rewrite this [existing content type, e.g., email or blog excerpt] into a LinkedIn post targeting [audience, e.g., young professionals starting their investment journey].”

## Why Rewriting is Essential

Asking AI to rewrite content allows you to refine and elevate your messaging to align perfectly with your voice and audience. Instead of settling for a first draft, use AI to explore alternative tones, phrasing, and emphasis points until the result feels polished and impactful.

### Rewriting ensures the final product is:

- **More Authentic:** It reflects your firm's unique tone and brand identity.
- **More Powerful:** Emphasizes the key message in a way that resonates with your audience.
- **More Tailored:** Fine-tuned for a specific purpose or audience segment.



**PRO  
TIP**

Ask for multiple rewrites with specific adjustments each time (e.g., "Make it more concise" or "Add a conversational tone"). Combine the best parts to create content that truly stands out.



# 2025: YOUR YEAR TO THRIVE

Standing out in 2025 requires bold, authentic marketing, a commitment to personalization, and the strategic use of technology. By focusing on these strategies, you can deepen client relationships, empower your advisors, and drive growth like never before.



Snappy Kraken is here to help. This is the year to stand out, grow stronger, and connect deeper with your clients. Start your journey today by [booking a demo with Snappy Kraken](#) and unlock the strategies to thrive in 2025.

**BOOK A DEMO**