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demonstrating expertise, trustworthiness, and value.

**Becky Livingston** • Mar. 04, 2024



Marketing for advisory services firms is a nuanced process that requires a blend of traditional strategies and innovative approaches to stand out in a competitive landscape.

The goal is to not only attract clients but to also build long-term relationships by demonstrating expertise, trustworthiness, and value.

# Marketing Secrets

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industry or service line stand to it. The answer is more than likely, yes.

Here's how.

Craft content in a question and answer format. Identify the common questions your existing clients ask, and then share a piece of content (blog, video, podcast, webinar, etc.) about that question and how your firm would answer it.

Example:

You have a webpage listing financial services your firm provides to condominium association boards. Take that information and apply it to a board member's fear, such as "I've heard horror stories about condo associations facing financial troubles, and I'm terrified we're not prepared enough." How would you answer that?

## Social Media

With the continued decline in [social media engagement rates](#), what can a firm's social media team do? Here are some out-of-the-box social media strategies advisory services firms could employ, such as:

### LinkedIn

On high-profile firm member pages, ask them to post an article on their personal profile about an industry, services, line, or topic they are passionate about. Provide them with a short list to choose from along with the potential articles. Also provide staff with the post they should share, including relevant keywords, keyword-specific URL, and up to three relevant hashtags. For example, you can see articles on [my LinkedIn profile](#).

Another option is to promote high-profile events and services you offer using a LinkedIn banner. LinkedIn banners can be branded and customized to fit just about

any need. They can be applied to company pages (1128 x 191h pixels) and personal

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## Google Business Profile Posts

On this platform, you don't use hashtags but you do want to focus on questions people ask about services you provide. For example, if your firm works with closely held businesses, a Google Business profile post might be:

Why is succession planning important for my closely held business, and how can you help?

Succession planning is crucial for ensuring the long-term sustainability of your business. It involves preparing for the future by identifying and developing new leaders who can replace old ones when they leave, retire, or pass away. Our advisory services guide you through the complex process of succession planning, ensuring a smooth transition that safeguards your business's legacy and values. Learn more [link].

Include an image and a call-to-action button that links to your services or contact us page. [View an example in this article.](#)

## Boosted Posts

For a small amount, \$1 – \$10 per day, you can boost a post your firm's shared in the past. Boosted posts allow you to target a geography, interests, and more depending on the platform. Consider this when you're promoting a webinar, event, service, or podcast.

## Network and Build Partnerships

Building a network and establishing partnerships with other professionals can lead to referrals and collaborative opportunities. One of the opportunities you'll find is speaking at industry events, seminars, workshops, and podcasts. For example,

presenting a case study on “Innovative Accounting Solutions for Tech Startups” at a

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clients searching online for advisory services.

Start by identifying and incorporating keywords related to your services, such as “best business advisory firm” or “advisory services for commercial real estate” into your webpage content, video channel, blog content, and image alt tags throughout the site.

Also, optimize your website for local searches by including your firm's location and registering with a [Google Business Profile](#). You can find best practices and examples in “[Boost Your Local Google Ranking With This Single Step](#).”

## Client Testimonials and Case Studies

Showcasing success stories and testimonials from satisfied clients can significantly boost your firm's credibility. Feature client testimonials prominently on your website and in your marketing materials. For example, a testimonial from a well-known business owner praising your firm's advisory services could be shared on your firm's social media. Incorporating a tag to the client exponentially expands the number of people who can see your post.

## Case Studies

Publish detailed case studies that demonstrate how your firm has helped clients overcome specific business challenges. For example, a case study on “Comprehensive Restructuring for a Family-Owned Business” can illustrate your firm's problem-solving capabilities. Read more about “[How to Harness Case Studies in Your Marketing Efforts](#)” here.

## Email Marketing and Personalized Service

Email marketing remains an effective way to keep in touch with clients, nurture leads, and share valuable information.

Send a monthly newsletter with firm updates, financial tips, and links to your latest

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Marketing for advisory services requires a strategic blend of content creation, social media engagement, personalized service, and networking. By implementing these tips, firms can attract more clients, establish themselves as industry leaders, and build lasting relationships.

Remember, the key to successful marketing is consistency, plus a willingness to adapt to changing market dynamics and client needs.

Need help? Give me a call.

Becky Livingston is the owner and CEO of Penheel Marketing, a New Jersey-based firm specializing in social media and digital marketing for CPAs. With over 25 years of marketing and tech experience, she is the author of “SEO for CPAs – The Accountant’s SEO Handbook” and the “The Accountant’s Social Media Handbook.” In addition to being a practitioner, she is a dog lover, an active Association for Accounting Marketing’s (AAM) committee member, an adjunct professor, and HubSpot partner. Learn more about Becky and her firm at <https://Penheel.com>.

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