

Record

Q1 2026 PERFORMANCE

After two years of stagnant growth

How a \$2 Million Revenue RIA Reversed Two Years of Stagnant Growth with Social Advisors Fractional CMO Services

A three-advisor RIA with a strong reputation but disconnected marketing, an aging team, and two years of flat growth needed more than a new campaign — it needed a unified growth strategy. Beginning in November 2024, Social Advisors stepped in as Fractional CMO and rebuilt the firm from the inside out.

Record Q1

GROWTH PERFORMANCE 2026

Packed

PIPELINE OF QUALIFIED OPPORTUNITIES

1 Added

NEXT-GEN ADVISOR RECRUITED

2nd

ADVISOR RECRUITMENT UNDERWAY

Full

BRAND, CRM & MARKETING REBUILD

PHASE 1ALIGN

Purpose & Vision

Before changing marketing, we focused on the business itself — clarifying vision, defining success, and identifying the firm they wanted to build over the next decade.

- Unified direction across all three advisors
- Growth strategy replacing disconnected tactics

PHASE 2DEFINE

Ideal Client Profile

The firm's greatest success came from serving business owners, professionals, and affluent families. We built a detailed ICP that became the foundation for every marketing, referral, and business development decision.

- Complete clarity on who to attract
- Consistent targeting across all channels

PHASE 3BRAND

Brand & Website Transformation

We rebuilt the firm's positioning, messaging, website, and social media presence to clearly communicate who they serve, why clients choose them, and what the future of the firm looks like.

- Modern brand reflecting the quality of advice delivered
- Consistent client experience across every touchpoint

PHASE 4BUILD

CRM & Marketing Infrastructure

Prospects and clients were mixed in the CRM. Campaigns operated in silos. We rebuilt the entire marketing infrastructure — segmentation, workflows, automation, tracking, and reporting.

- Unified growth platform with full pipeline visibility
- Automated follow-up and lead management

PHASE 5ELEVATE

Client Experience

Meetings relied on advisor expertise but lacked visual support and structured workflows. We redesigned the planning process with frameworks, presentation materials, and clear next-step documentation.

- Stronger retention and client engagement
- Greater confidence during prospect meetings

PHASE 6GROW

Succession & Talent

All three advisors were over 63. We helped recruit a younger advisor in his 40s who aligned with the firm's culture and vision — immediately strengthening succession positioning with clients and prospects.

- Next-gen advisor successfully onboarded
- Second advisor recruitment actively underway

PHASE 7DEVELOP

Business Development

We rebuilt a relationship-centered growth system — reintroducing referral programs, client events, COI development, and LinkedIn prospecting while using automation to strengthen (not replace) relationships.

- Original content replacing generic vendor material
- Relationship-first growth replacing purchased leads

PHASE 8LEAD

Weekly Growth Leadership

Every week we meet with firm leadership to review pipeline, marketing performance, referrals, and advisor accountability — creating the ongoing alignment that sustains growth.

- Strategic coaching embedded in the leadership team
- Continuous refinement of every growth initiative

KEY OUTCOMES

Growth Is Not an Activity — It's a System

Record Q1 2026 performance after two consecutive years of stagnant growth

Complete brand, CRM, and marketing infrastructure rebuilt from the ground up

Younger advisor recruited; second next-generation hire actively underway

Unified strategy replacing disconnected vendors — one system, one direction, one result