

\$300M

AUM AT ENGAGEMENT START

3-advisor RIA building a repeatable growth system

How a \$300 Million RIA Built a Predictable Growth Engine Through Automation, Content, and Strategic Relationships

A successful three-advisor RIA had built its practice on referrals and relationships — but wanted something more predictable. Beginning in September 2025, we built a systematic marketing engine that generates new ideal prospects every single business day, nurtures them automatically, and converts them through educational events.

7-10

NEW IDEAL PROSPECTS DAILY

95%+

PROSPECT RETENTION RATE

127

WEBINAR REGISTRANTS

35

QUALIFIED FOLLOW-UP OPPORTUNITIES

3

NEW APPOINTMENTS FROM ONE EVENT

STEP 1 DEFINE

Ideal Client Profile

Before launching any campaigns, we worked with the advisors to define their Ideal Client Profile — business owners and entrepreneurs with specific demographic, professional, and behavioral characteristics aligned with the firm's planning expertise.

This ensured every marketing effort targeted the right audience rather than simply generating activity.

OUTCOME

- Precision targeting from day one
- Every campaign dollar working toward the right prospect

STEP 2 PROSPECT

Daily LinkedIn Prospecting System

Using LinkedIn Sales Navigator integrated with the firm's CRM, each advisor sends ~30 connection invitations per business day to qualified prospects matching the ICP.

With acceptance rates near 30%, the firm consistently adds 7-10 new ideal prospects to its network every day — through relationship-driven messaging, not sales pitches.

OUTCOME

- 7-10 new ideal prospects added daily
- ~30% LinkedIn connection acceptance rate
- Rapport-first outreach strategy

STEP 3 NURTURE

Automated Lead Nurturing

Each new LinkedIn connection is automatically transferred to the CRM and enrolled in a 2-3 message educational email sequence focused on delivering value, not promoting services.

Contacts then enter ongoing marketing communications featuring market insights and business-owner planning ideas. Despite open unsubscribe access, 95%+ of contacts stay engaged.

OUTCOME

- 95%+ prospect retention rate
- Fully automated CRM enrollment
- Trust built before any sales conversation

STEP 4 PUBLISH

Consistent Content Marketing

Each month the firm receives SEO-focused website content, two educational email campaigns, and 8-10 social media posts — all crafted specifically for business owners.

This consistent presence keeps the firm visible and positions the advisors as trusted resources rather than salespeople.

OUTCOME

- Monthly SEO & GEO website content
- 2 educational email campaigns/month
- 8-10 social media posts/month

STEP 5 CONVERT

Educational Events & COI Partnerships

Monthly webinars designed for business owners serve as the natural conversion point — transforming digital relationships into real conversations. Strategic guest speakers have cultivated two valuable COI relationships.

One webinar featuring an investment banker generated 127 registrations, 46 attendees, 35 qualified follow-ups, and 3 new appointments.

OUTCOME

- 127 registrants from a single event
- 35 qualified follow-up opportunities
- 3 meetings scheduled with ideal targets from one low-cost event

KEY OUTCOMES A Repeatable System, Not a One-Time Campaign

Ideal prospects added to the network every business day through systematic LinkedIn outreach

Automated CRM nurturing maintains 95%+ retention and builds trust before any sales conversation

Monthly content positions the firm as a trusted authority among business owners

Educational webinars convert digital relationships into qualified appointments and COI partnerships