WORK SAMPLE · MEDIA & MARKETING STRATEGY

Social Media Strategy Update

Independent registered investment advisor, ~$2.8B AUM · September 2020 update
Prepared by Monica Vendituoli for a Communications Strategy Group client

Client anonymized. A real strategy document I wrote. The firm's name, its people, and internal asset links have been removed. Recommendations and structure are unchanged.

Why the plan was reopened

2020 put the firm's original social plan on hold — first COVID, then a summer of social unrest that made scheduled content feel tone-deaf. Rather than restart the old calendar, we re-evaluated what the firm actually needed from social going into 2021. Two recommendations came out of it: get employees sharing on LinkedIn, and make the firm's expertise visible instead of implied.

1. Optimizing employee LinkedIn engagement

LinkedIn is where the firm's high-net-worth prospects are, and Facebook reach depends on employees too. The obstacle isn't willingness — it's that employees at a fiduciary firm are reasonably nervous about compliance. The strategy is two-fold: make sharing easy, and make the profiles worth sharing from.

Make it easier for employees to share

- Create a one-page employee social media best-use document, built jointly with the firm's compliance team, that includes:
  - A plain breakdown of the do's and don'ts of sharing content from a compliance standpoint.
  - Examples of compliance-approved shares — and examples of posts compliance would find concerning.
  - Step-by-step instructions and best practices for engaging with the firm's posts.
- Distribute the document to all employees and keep it somewhere easy to find. A policy nobody can locate is a policy nobody follows.

Increase brand awareness through employee accounts

- Build templates for featuring employees in Facebook and LinkedIn posts, so employee-centered content doesn't depend on someone writing it from scratch each time.
- Have all employees complete their LinkedIn profiles against a short standard. Management- and advisor-level staff likely already have this from prior work, but firm-wide consistency is where the compounding happens. The one-to-two-page guide provides:
  - Suggested language for the "About" section of employee profiles.
  - A reminder to include a high-quality profile photo.
  - Approved banner image options, with a library link for more.

2. Highlighting the firm's expertise

The firm's social presence described what it did without demonstrating that it knew anything. The fix is to source content from the people who have the expertise rather than from the marketing calendar.

- Schedule a call with two or three of the firm's financial planning advisors to understand its planning expertise and, more importantly, the *why* behind each topic. That conversation feeds social *and* media outreach — one interview, two channels.
- Have the studio build a graphic for each financial planning subject, then repurpose those graphics across social and other marketing materials.
- Mine the firm's existing investment deck for data worth visualizing, including:
    - **Assets under management growth** — a year-over-year chart of AUM growth since the firm's founding in 1997, which makes an 18% annual growth rate concrete instead of abstract.
    - **Geographic reach** — a U.S. map showing office locations alongside where clients actually are, which tells a national story a regional firm doesn't usually get credit for.
    - **Team structure** — the two-team model (advisory and institutional investment), which explains the firm's fiduciary positioning better than a paragraph does.

The through-line

Both recommendations move the firm from broadcasting to being visible through the people who work there. That's cheaper than paid distribution, it survives algorithm changes, and at a fiduciary firm it's the only version of social media that compliance will consistently approve.
