Fiduciary Advisor Content Strategy

Worksheet

Kelsey Ray
COPYWRITER

Introduction

Below is a collection of questions and fields to develop your content strategy as a Differentiated Advisor. It should take 15-20 minutes to fill out.

Overview: 20XX Content Strategy

Your Advisory Name	
Who will content be published as?	☐ Myself ☐ Another Advisor ☐ No byline
What are our values?	
Who are our clients? Include demographic and value information.	
Who are our local and content competitors?	
Considering the above, what are our top 5 differentiated characteristics?	

Content Specifics

Content type(s)	☐ Website pages (Recommended)
	☐ Blog posts (Recommended)
	☐ Newsletter
	☐ Client newsletter (Recommended)
	☐ Substack
	☐ Social Media
	  ☐ Facebook (Recommended)
	  ☐ Instagram
	  ☐ LinkedIn (Recommended)
	  ☐ X (Not Recommended)
	  ☐ Other _____
	☐ Case Studies
	☐ Guides (Recommended)
	☐ eBooks
	☐ Webinars (Recommended)
	☐ Calculator Tools
	☐ Podcasts
	☐ YouTube Videos
	☐ Guestposting
	☐ Local events

Constraints. What is your budget and how much time can you commit marketing or to sharing expertise with your marketer?	
How often will you publish on each platform?	
What you like to see after 6 months, 1 year of consistent publishing?	

Benchmarks & Resources

Benchmarks to track. Examples include posting 100 articles, 10% traffic increase from Google, etc.	
Resources. *Link to style guides, other content brands you would like to emulate, etc.*	