

CallRail

Checklist

# 7 Steps to increase marketing ROI for your Financial Services company



# The 7 Step Process:

- **1. Get a handle on where leads are coming from:**  
Do most of your leads come in as referrals, from Google, or through advertisements your firm places on billboards or runs on Facebook and the like? Find out with [call tracking](#), and capitalize on your best tactics so you can double down on them going forward.
- **2. Optimize your Google Business Profile:**  
Ensure the information is correct, up-to-date, and as extensive as possible. Include recent photos and respond to reviews - show you care about your clients. Use a [call tracking number](#) to measure and manage incoming leads from your Business Profile.
- **3. Audit PPC campaigns:**  
Pay-Per-Click should not be a money pit. Constantly monitor, analyze, and optimize your campaigns. Pinpoint which keywords result in high-quality leads. Or, reverse engineer the process: take note of [how your prospects speak](#) and incorporate this language into your paid ads.
- **4. Create engaging landing pages:**  
You have about 8 seconds to grab a visitor's attention when they visit your landing page. Draw insights from conversations with your leads and customers to create clear, compelling landing page messaging based on your findings.
- **5. Invest in high-quality content:**  
Show prospects that your company knows what it's talking about. Create content, like social media posts, blogs, or guides, that delves into consumers' pain points, presents solutions, and presents your team as the experts they are.
- **6. Embrace the power of social media:**  
Social media allows companies to engage with customers publicly, answer FAQs and build a reputation as a trusted expert. Try different channels to see which are the most effective. Your prospects might prefer Facebook, Twitter, Quora, or Reddit - so test the waters before working out which channel is right for your firm.
- **7. Use everyday insights to drive the customer experience.**  
[Identify](#) whether an incoming lead is just curious about your services, or ready to schedule an appointment - and improve their experience by [routing](#) them to the best representative from your team.

Learn more about how call tracking can help increase the marketing ROI for your Financial Services company. Try our [Call Tracking ROI calculator](#) now.