

WHITE MARBLE

An Alpha Group Company



Integrating investment marketing for impact

Top actions to take



Investment marketers operate in a competitive industry with sophisticated clients and ever-changing markets. Success requires highly-coordinated efficiency and precision.

Yet, many firms still conduct their marketing in siloes. In 2025, this can no longer be acceptable; the baseline for achieving your results must be integrated marketing, where alignment and consistency across all your marketing activities drives higher engagement and more measurable ROI.

What is integrated marketing?

Integrated marketing is the process of delivering a cohesive experience across all channels, allowing your audience to perceive and engage with your brand and products consistently and reliably. For investment marketers, this means uniting:

- **Content Marketing** – Including collateral that tells a compelling story about your brand and products and thought leadership that positions your firm as an industry expert.[LB1] Content should speak in alignment across business units, asset classes, subsidiaries, etc.
- **Digital Marketing & SEO** – Strategies that ensure that your firm's digital footprint is purposeful, compelling and ranks in searches relevant to your target clients.
- **Email Marketing** – Through campaigns that nurture relationships with current and prospective clients.
- **Social Media & PR** – That builds and protects your firm's reputation.
- **Paid Media & Search** – Reaching potential investors and advisors where they are and when they're actively looking for information.

By breaking down silos and merging all of your marketing channels with an integrated approach, you ensure that your message resonates across the board.



Top actions to foster integrated marketing

Integrated marketing doesn't happen overnight and likely will always be something that needs to be prioritized and worked toward. Particularly in larger organizations, the default can be to operate in siloes simply because it feels easier or more efficient. By consistently adopting several tactics, though, you can encourage an integrated marketing approach that improves your impact without hindering efficiency.

1. Collaboratively define and communicate your goals and objectives.

Set specific, measurable, achievable, relevant, and time-bound (SMART) goals. An example SMART goal could be to increase email click-through rates by 10% over the next two quarters. Involve your entire team in goal-setting to promote ownership and alignment.

Clearly communicate goals and objectives across the organization to unify messaging and focus. Plan for regular measurement and adjustment... because things change.

2. Take practical steps to encourage internal alignment and transparency.

Alignment isn't just about tactical goals; it includes shared values and work approaches. Define what your team values, such as transparency, accountability, and client-centric thinking. Leadership should uphold these values and consistently promote them.

Build out processes and checkpoints with the explicit goal of encouraging efficient yet integrated marketing. There's a fine line to walk – too much operational bureaucracy can hinder speed and progress, but not enough can lead to misalignment and inconsistency. Use shared calendars, project management tools and workspaces to promote visibility.

Annually or more frequently, review your most important marketing processes and evaluate how they could be improved. For example, do five people need to approve that email campaign when two approvals can achieve the same result? Conversely, maybe other emails should be reviewed by more people, to encourage repurposing and wider distribution. These types of processes can become rote for many employees, and it's worthwhile to occasionally step back and analyze them with a critical eye.

White Marble works with firms to map out marketing processes and strategically evaluate opportunities to improve.

3. Define your target personas and align your teams' efforts around them.

Build out or reevaluate your client personas regularly. Economic shifts, market changes, and evolving client preferences mean your personas may shift.

Ensure that every team is working off a common idea of their target audience. And tailor messaging to address the specific needs of each persona to improve engagement.

4. Develop a consistent brand voice and messaging.

Integrated marketing means speaking with a consistent voice across all your channels and content.

Define your brand voice by coalescing teams' and departments' perspective of your firm, the value it offers to clients, and how it seeks to partner with them, among other considerations.

Document that voice in a style or tone of voice guide and implement governance to ensure that all new efforts ladder up to it. Continuously reevaluate and refine your brand voice to ensure it resonates across all platforms.

You can and should adjust the tone as needed; for example, a thought leadership piece will be more formal than a social media post. An event invite email may be more conversational than an email announcement of a new product.

Make sure messaging aligns with client expectations and differentiates your firm from competitors.

“Integrated marketing means speaking with a consistent voice across all your channels and content.”





5. Optimize how different teams can personalize and scale efforts across the firm.

Often, what thwarts a marketer's good intention to adopt an integrated approach is simply the unique needs and demands of every channel, every client, every product, etc. However, you can still build foundational assets and processes that encourage an integrated approach, while maintaining a targeted, personalized touch.

Use content calendars and repeatable workflows to facilitate scalability. Develop templates for everything you can, from social media graphics to email newsletters to blog images. Get more mileage out of your existing content by transforming it into new content, e.g. a webinar can be turned into a blog, social media snippets, and an email campaign.

For firmwide or global content, ensures there's a process for adapting to regional or channel needs. For larger firms, this may mean there's a core Center of Excellence or global team creating flagship content that then funnels to regional or channel-focused teams to adapt and personalize.

Transparency in team activities ensures nothing goes to waste and high-value content can be leveraged effectively.

6. Monitor and analyze performance for continuous improvement and alignment.

Finally, to pursue truly integrated marketing, collect and interpret data from all marketing channels to gain a comprehensive view of campaigns' performance. With a holistic view of how you are doing, you're better able to assess where different teams or initiatives can support or learn from each other.

Adjust strategies based on insights to optimize future efforts and maximize ROI. And be sure to actually act on it! Use data-driven decisions to align marketing outcomes with firm goals.

What if ...

... you had a crystal-clear view of all the marketing efforts currently happening and their purpose?

... all of your channels' strategies operated in alignment and enhanced each other?

... you always knew how to leverage one channel's strengths to improve another's?

... your messaging always spoke consistently and impactfully, from your brand awareness tactics down to your most specific sales pitch and across all audiences?

... not only was your entire marketing team aligned on and supporting your goals, but so was every other team you interacted with, from distribution to compliance and more?

These are dreams that, frankly, will be impossible to make true 100% of the time. But through tactics that break siloes and foster integrated marketing, investment marketers can work closer toward them and ultimately create marketing that makes more impact, more efficiently.

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