



Kirkbride Financial Marketing Strategy

9/16/24
Prepared by

Blyth Ellsworth
Digital Business Manager
Quicksilk Solutions



Values

Kirkbride Financing encourages young eligible individuals to invest in their education to make stronger, confidence-backed choices to improve their financial gains. Through our one-on-one consultation, micro-topic courses, downloadable content, and subscription monitoring, we can provide the tender care and financial literacy that guardians or early educators missed.

Goals

We aim to expand our engagement with our target audience and increase our retention rate on subscriptions

Mission

We feel a strong obligation to get the right financial answers out to our clients before their financial decisions are made. Our goal is to provide regular guidance and education to our clients so they can make immediate decisions and plan for their future spending goals.

Marketing Strategy

I. Who

Our client:

- College student Aged 18-25
- Potentially brand new credit card
- First Job with “adult” paycheck
- PAIN: Coming from a household of low financial literacy. grew up low-income and doesn't want to repeat mistakes. Has financial goals but no idea how to achieve them. Fears retirement plan in the distant future.
- DREAMS: having investments, wanting to own a house or car (large financial purchase). Wants to buy stuff without fear of going deep into debt.
- FREQUENTS: Youtube and TikTok for general consumption. Googles simple phrases such as “How to save money” ,“How to increase income” or “Best side hustles”. Marketwatch, or Yahoo Finance.
- NOT FOR: Financial savvy individuals or Economics majors. Not for property owners.

While we believe everyone can learn something about financing through our material, our company is set up to help guide early financially illiterate individuals who seek to understand this complex topic in simple terms.

II. What

What we offer:

- We have carefully curated materials at bite-sized levels, hand-holding consultations, or monthly monitoring subscriptions to help clients tackle the complex topic of financial literacy with life-building results. Clients are stepping closer to financial freedom and the ability to make educated financial decisions to reach their individualized spending goals.
- DETAILS: online classes, digital calls with experts, PDF printouts with step-by-step instructions for complicated setups, private Discord group.
- WEAKNESS: The product lacks a “Cookie cutter” structure and relies on client-driven goals or dedicated interaction. It’s not quite “plug and play”.
- OBJECTIONS: potentially challenging to invest in financial literacy without having a strong grasp of finances.
- COMPETITION: The competition doesn’t offer any downloadables or lead magnets, they are lacking tier levels of interest. We can counter that by engaging with clients on what they’re ready to take on while encouraging them to expose themselves to knowledge early.

III. Where

Advertisement Options:

- Social Media: Instagram and Tiktok.
- Paid Advertising: Instagram, Tiktok, YouTube, AdSense
- Search Engine Results
- Online communities or groups
- Podcasts geared toward college life or future planning
- Industry websites and blogs

IV. How

How do we piece it all together:

- Search engine optimization for specific search terms for “Financial Guidance”, “financial guidance for young adults”
- Cornerstone blog posts (x2 a month) to drive organic traffic regarding financial literacy
- Paid advertising for TikTok and Instagram: Set up accounts on both platforms with starting 5 posts and regular stories and live streams to provide easy tips on fearful topics like talking to a banker or debt consolidation.
- Affiliate marketing with smaller channels geared towards young adults.
- Podcast: create x2 a month of relevant news podcasts on financial decisions.
- Webinars/Discord town halls for engaging directly and answering questions live.
- Youtube channel for visual learners

V. Package

How is it presented:

- The primary website hosts a shop of downloadable PDFs (checklists, instructions, digital journal pages, budgeting documents, tax helpers, etc). The secondary website houses learning videos purchased through the shop.
- The primary website has a lead magnet to financial literacy consultation and suggested subscription package (package range listed clearly on the website)
- All advertising points back to the primary website to get the potential client to schedule a consultation or purchase a micro-document.
- Customer Support: Chatbot for after-hours questions that log a ticket for VA to assist with. Email support is offered for extended questions.

VI. Final Thoughts

Financial literacy is vital to every young adult's future. Getting the answers to them before they make financial choices is imperative. Being there with them through their financial journey of a "First credit card", "A first car loan", "A first stock option" or even that golden goal of "A first home" is our manifesto.

Start with

Phase 1: Make it easy to find through search term optimization and create foundational blog posts.

Phase 2: Ramp up to regular social media presence to push paid advertising during launch week.

Phase 3: Follow up with assisted content podcasts and YouTube videos or affiliated marketing.