

10 Beginning-of-Year Marketing Mistakes (and How to Avoid Them)

At the start of the year, many successful advisory firm leaders feel a familiar tension: growth has been good, but it doesn't feel systematic or future-proof. The issue usually isn't effort; it's a lack of clarity about what actually drives organic growth, and in what order.

Below are the ten mistakes we most often see (even among very well-run RIAs), and what you can do to make the most of your marketing efforts in 2026.

1. Marketing Without a Documented Strategy

You're doing a lot: emails, social media, events, maybe a newsletter. But if someone asked you to explain how all of this connects to your growth goals, you'd struggle to answer.

Why It Doesn't Work:

Without a documented strategy, every new idea feels equally urgent. You can't tell what's working because you never defined what success looks like in the first place.

What to Do Instead:

Take a step back and document your strategy. What business goals is marketing supposed to support? We help you develop a framework for making confident decisions instead of reacting to the latest trend.

2. Undifferentiated Messaging

You know your firm is different. But when prospects visit your website, they see the same language they've seen everywhere else. Nothing tells them why you're the right fit for people like them.

Why It Doesn't Work:

Generic messaging doesn't build trust or create recognition. If your value proposition could apply to any firm, it won't stick with the right prospects.

What to Do Instead:

Get specific about who you serve and what makes you different for that audience. When your positioning is clear, the right prospects immediately think, "This firm gets me."

3. Founder-Dependent Growth

Most of your new clients come through you or a handful of rainmakers, and your next-gen advisors don't have a clear path to contribute to growth.

Why It Doesn't Work:

Founder-dependent growth makes succession planning harder and puts unnecessary weight on your shoulders when you know the business needs to grow beyond you.

What to Do Instead:

Build a repeatable growth system that doesn't rely solely on your personal network. Our goal is to translate what's in your head into a process others can follow, so growth becomes a team effort, not a solo act.

4. Measuring Activity Instead of Outcomes

You look at website traffic, email open rates, and social media engagement. Things are "going well." But when you ask whether marketing is actually bringing in new clients, you don't have a clear answer.

Why It Doesn't Work:

Vanity metrics feel productive, but they don't tell you whether marketing is worth the investment. Activity doesn't equal results.

What to Do Instead:

Shift your focus to business outcomes: How many qualified prospects are you attracting? What's your conversion rate? We help firms identify what to track and how to connect marketing activity to actual growth.

5. Attributing All Growth to Referrals

When you ask where new clients come from, the answer is almost always "referrals" or "the website." But what happened before someone filled out a contact form or mentioned your name? You're giving credit to the last click, not the full journey.

Why It Doesn't Work:

This hides the marketing that's quietly building trust (your content, your podcast, your LinkedIn presence) and makes it harder to know where to invest next.

What to Do Instead:

Start thinking about marketing as a system, not a single moment. Prospects experience multiple touchpoints before they reach out. When we map this journey, we can see what's really working and where to double down.

6. Turning On Paid Ads Too Soon

Growth slowed, so you decided to try paid advertising. It felt like the logical next step. But the leads were wrong-fit, the cost per lead was higher than expected, and the whole thing felt like throwing money into a black hole.

Why It Doesn't Work:

Paid ads amplify whatever you already have. If your positioning is unclear and your website doesn't convert, ads just amplify the confusion.

What to Do Instead:

Build the foundation first: Get your messaging right. Make sure your website is conversion-ready. Test your content with your existing audience. Then use paid advertising to scale what's already working.

7. Going Downmarket

You assume that to grow through marketing, you'll need to serve smaller clients or cast a wider net. The idea makes you uncomfortable because it's not the business you want to build.

Why It Doesn't Work:

Going downmarket dilutes your differentiation and complicates your service model. It's solving the wrong problem.

What to Do Instead:

Use marketing to attract more of the clients you already serve best. You don't need to change who you are; you need to get better at showing the right people why you're made for them.

8. Hopping On the Podcast Bandwagon

Your peers were talking about their podcasts. It seemed like the thing to do. So you started one. But after a few months, it felt like a lot of work for minimal return, and you're not sure anyone is actually listening.

Why It Doesn't Work:

A podcast without a strategy is just another channel creating noise. If you don't have a clear audience, point of view, and distribution plan, the effort fizzles out fast.

What to Do Instead:

Choose your channels based on your strategy, not what everyone else is doing. Maybe a podcast is right for you, or maybe it's a monthly email, a video series, or a quarterly event.

9. The CMO Band-Aid

You brought in marketing talent, hoping they'd figure out the strategy and drive results. But without clear direction from leadership, they're struggling to gain traction. You're frustrated. They're frustrated.

Why It Doesn't Work:

Even the best marketers can't succeed without clarity on goals, priorities, and success metrics. Strategy has to come first, execution follows.

What to Do Instead:

Get aligned on your growth objectives and marketing strategy before you bring in talent. Then give them a clear roadmap to execute.

10. Putting All Your Eggs in the Website Basket

Your website feels outdated, so you're planning a redesign. You're hoping the new site will finally start generating leads and make growth feel easier.

Why It Doesn't Work:

A beautiful website doesn't drive growth on its own. Without the right traffic, clear messaging, and conversion pathways, it's just a prettier version of the same problem.

What to Do Instead:

Think of your website as the hub of a larger system. It needs great content feeding into it, a clear value proposition, and thoughtful follow-up once someone engages.

Ready to Build a Marketing System That Actually Drives Growth?

If these patterns sound familiar, let's talk. We offer complimentary 60-minute strategy consultations to help advisory firm leaders get clarity on what's working, what's not, and where to focus next. Together, we can:

- Review your current growth trajectory and marketing efforts
- Identify the gaps between where you are and where you want to be
- Map out potential next steps for systematic, sustainable growth

[Schedule Your Complimentary 60-Minute Consultation →](#)