

BENCHMARKING YOUR FINANCIAL MARKETING



Are There Investment Branding and Marketing Benchmarks?

Certainly. Just like asset managers benchmark against an index, financial services marketers have benchmarks for their activities. The challenge is figuring out what the right benchmarks are for your firm and devising a strategy to meet or exceed them through effective marketing.

That is what this guide addresses. The following framework combines qualitative and quantitative methods to help financial services firms establish a meaningful marketing benchmark: one that reflects where your brand stands today and gives you a measurable baseline to improve against over time.

What is an Investment Branding Benchmark?

In portfolio management, benchmarks are universal. In marketing, there is no equivalent standard — firms and agencies are largely left to define success on their own terms. Some benchmarks are qualitative, drawn from aspirational brands that represent a positioning your firm wants to achieve. Others are quantitative, tied to metrics like traffic, leads, engagement, or AUM growth.

The most effective approach combines both. A qualitative benchmark captures whether activity is building the right brand perception. A quantitative benchmark measures how much of that activity is occurring and at what return. Together, they give you a complete picture.

Building Your Investment Branding Benchmark

The strategies outlined in this guide are designed to help you test and analyze your brand across both dimensions. This guide organizes that process across three areas: qualitative brand analysis, quantitative performance measurement, and AI readiness. Not every method will apply to every firm, but working through the ones most relevant to your situation will give you a defensible baseline — one you can measure future marketing initiatives against, evaluate rebrand decisions with, and use to assess how AI search is positioning your firm relative to competitors.

Composite Benchmark Score	7/10
Strengths	<ul style="list-style-type: none"> - Content strategy - Social marketing - Search engine results
Key Opportunities	<ul style="list-style-type: none"> - Brand positioning consistency - Website experience - AI search visibility

QUALITATIVE STRATEGIES

Aspirational Brands

A useful start to qualitative benchmarking is to identify aspirational brands: firms whose perception, positioning, or presence reflects qualities you want to convey. These may come from financial services or adjacent categories such as hospitality, luxury, or technology. Narrow the list to five or six, then analyze choices behind their perception, including messaging, visual identity, content strategy, and client experience. The goal is to identify adaptable practices and gaps in your branding approach.



Patagonia: Purpose-driven brand that earns loyalty through consistency between stated values and demonstrated action.



Apple: Premium positioning built on clarity and simplicity, with sophistication that speaks for itself.



Ritz-Carlton: Service culture so deeply embedded it functions as a core brand asset.

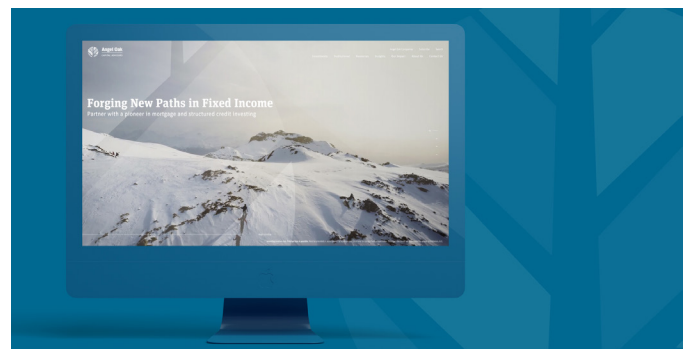
If most value propositions are the same, or key characteristics distribution is centered around five to seven words, then you are in a good place.

Internal Surveys

Surveys are a great place to start gauging how your employees view and communicate your brand. Set up questions that ask each individual to write down what they think the firm's value proposition is and three to five key characteristics that represent the brand. Then compare how much variance there is in the responses. If most value propositions are the same, or centered around five to seven key words, then you are in a good place.

Consistency Check

Consistency is key for brands, so another method used for analyzing a brand is by taking a holistic view of a firm's outward-facing marketing. Compile the key marketing documents, advertisements and look at the website to see how consistent the voice, messaging, tone and design aesthetics are.



External Audits

External audits of your brand can be powerful tools to identify perceived brand characteristics. By interviewing some of your clients and key referral sources, or doing more advanced strategies like social listening, you can develop a better perspective of how external parties view your brand. Comparing those results to your aspirational brands can reveal if a branding exercise can help to better align the market's perception of your brand. Another question for external audiences is the awareness of your service/product offerings. If clients don't know that you also have ETFs or do M&A advisory, you could miss potential cross-selling opportunities.

By interviewing some of your clients and key referral sources, or doing more advanced strategies like social listening, you can develop a much better perspective of how external parties are viewing your brand.



Competitive Analysis

Lastly, on the qualitative side we recommend looking at your competitive set. The financial services industry is an incredibly crowded space, so it is important that your brand and messaging stand out from your competitors. Take a look at a mix of your competitors and see how your messaging and visual identity stands out. Are they echoing the same value proposition as you? That's probably a sign that you may need some messaging analysis or an update. Is their website far superior to yours? Any competitive edge you can leverage will increase your business development success.

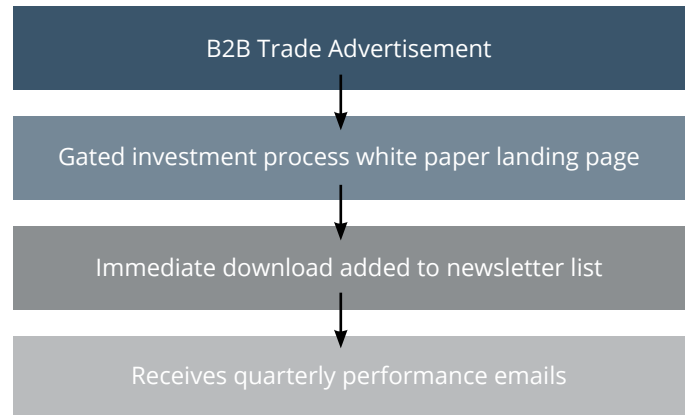
Once qualitative indicators are mapped, quantitative measurement gives those observations a numeric baseline.

QUANTITATIVE STRATEGIES

Scoring Your Marketing Funnels

Create a one-page flow chart detailing where prospects are introduced to your brand and track how they move through the marketing funnel.

Lead Generation Track 1



Analytical scoring: no preferences/interests on form, no marketing automation, no lead scoring, weak integration with sales: **4 out of 10**

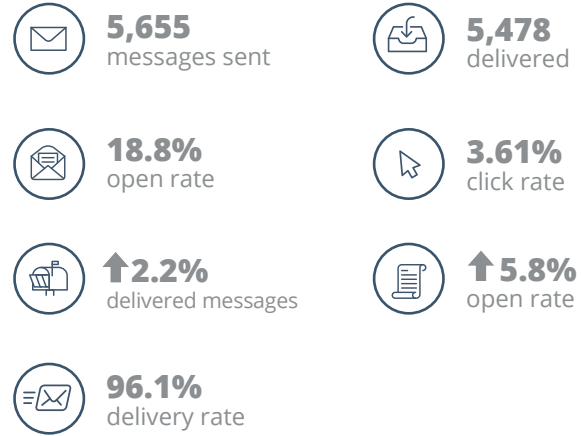
Total Monthly Users	New Monthly Users	Session Source
25,884 (+21%)	5,443 (+8%)	Direct: 64% Organic Search: 27% Paid Search: 4% Referral: 3% Organic Social: 2%
Avg. Session Duration	Click-Through Rate	AI Traffic Sources
01:38 (-12%)	4% (-6%)	ChatGPT: 83% Gemini: 10% Perplexity: 7%

Website Traffic & SEO

Analyzing the percentage shifts in site traffic and search engine rankings can also be powerful tools in understanding how often your brand is being searched and seen and what is driving that traffic. The goal is to provide that 'value-add' that they cannot find somewhere else. Understanding why your traffic has increased, whether from a press release or keynote speech at a recent conference, is important in identifying why people are seeking out your website. Keyword research can be done with tools like Google Keyword Planner, Google Search Console, SEMRush and AI Search metrics—to name a few. Keyword ranking is another metric that can be tracked over time—if you establish both brand and name recognition keyword groups, you can then track average rankings over time to see how your brand and website are tracking.

Email Marketing

Fortunately, most email platforms help you streamline the data and reporting for emails. Open-to-click ratio is a good place to start, with methods like A/B testing of subject lines or amount of content as ways to begin identifying what grabs your audiences' attention. Click-through rates can help determine brand engagement and how much interest your marketing is generating. A good baseline for open rates in financial services is 20% and a click-through rate for many of our investment clients is 3%. Enabling tracking through your email campaigns can also help provide more insight on web traffic and help score leads.



Advertising Metrics

A dashboard or database of key metrics such as click-through rate (CTR), return on investment (ROI) and spend versus sales or assets over time can be straightforward metrics to score your brand and marketing tactics. Not all financial marketers want or need to engage in digital advertising, but there can definitely be value in the exercise. A baseline metric is ad spend versus profit generated, which can set expectations for future campaigns. Ads can create additional value as well, such as thought leadership and brand awareness. Most digital advertising products, such as Google Ads, PPC, social platforms and online publications, will be able to provide metrics on click-through rates for your company type.

Spent	Impressions	Clicks
\$727.74	18,362	24
Average CTR	Average CPM	Average CPC
1.58%	\$10.66	\$1.96

The firms that track what works spend less and earn more.
The ones that don't are funding guesswork.

Social Media

Tracking followers and engagement can be a great investment branding benchmarking tool. We typically recommend focusing on LinkedIn and X. Follower count and its corresponding growth over time is a key metric to include when building your branding benchmark. Engagement is also a good metric to look at and aim for. If people are sharing your insights and adding their comments, it shows they are more than just a passive audience. The posts that draw the most engagement can help identify which topics and presentation methods are most worthwhile for you to focus on.

Once you have a good mix of qualitative and quantitative data, building a weighted average model for your investment branding benchmark will help set your firm up to measure the success of upcoming branding and marketing initiatives.



AI READINESS

AI Search Visibility

Qualitative and quantitative signals capture what your brand says and how it performs. AI Readiness measures whether that positioning holds up where prospects increasingly begin their research. Benchmarking should assess whether and where your firm appears across leading AI platforms. In which queries are you surfaced? How often are you referenced in category or comparative prompts? Tracking year over year changes in AI visibility and citation frequency indicates whether your firm is defining the category narrative or appearing within a competitor's framing.

Prospects are beginning their research inside AI interfaces, not just search engines. That means your investment firm may be summarized, categorized, and compared before a prospect ever reaches your website.

AI Interpretability & Summary Accuracy

AI platforms prioritize clear, well-structured content organized around user intent. That means financial firms must do two things well:

1. define a distinct, disciplined identity, and
2. embed that differentiation into content that directly answers the questions investors are actually asking.

If your messaging is unstructured, inconsistent, or loosely organized, AI systems may dilute or overlook key distinctions. But when priority themes, strategies, and differentiators are clearly framed around common investor concerns and expressed consistently across touchpoints, expertise becomes easier to extract, summarize, and compare.

Benchmarking should assess how effectively identity is structured around investor intent. Are core themes tied to real investor questions and delivered consistently across websites, thought leadership, media, directories, and third-party platforms? Is differentiation articulated so AI systems can reliably identify and contrast it? This lens clarifies whether positioning will surface accurately in AI-driven discussions.

AI Authority Signals & Digital Credibility

AI systems prioritize sources that demonstrate consistent expertise and verifiable authority. In financial services, where trust underpins decision-making, those signals carry weight.

Investment firms should assess whether their credentials, proof points, thought leadership, and third-party validations are structured clearly and reinforced across channels.

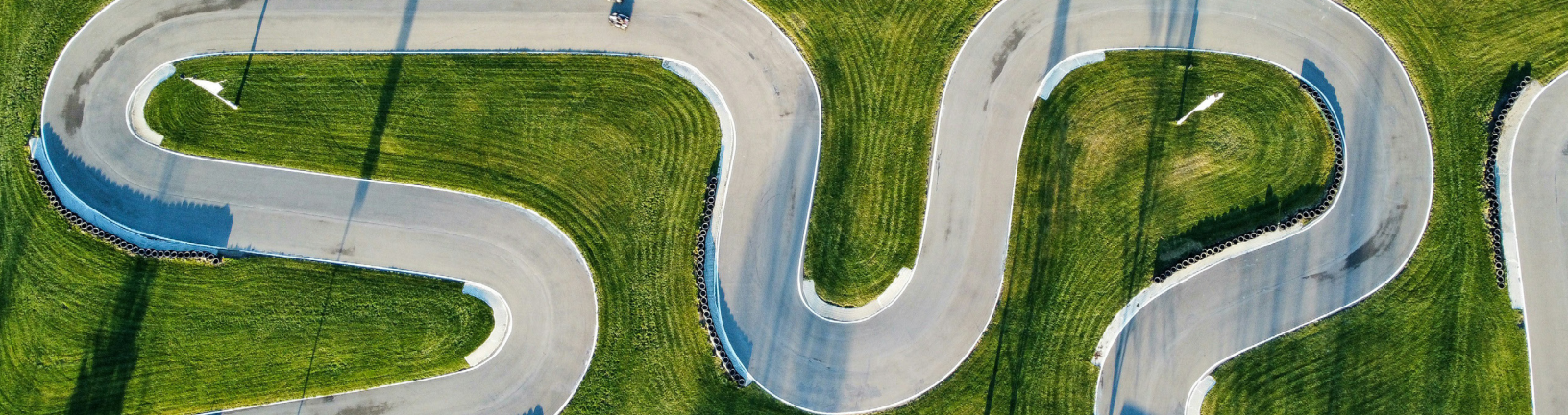
Are core expertise areas consistently linked to the firm? Are citations, awards, partnerships, and media references visible and aligned with positioning? Evaluating these authority signals clarifies whether the brand is interpreted as a recognized leader or a general category participant.

Session Source	Sessions	Views	Total Users
chatgpt.com	233	563	153
perplexity.ai	26	37	15
claude.ai	7	17	4
gemini.google.com	5	8	5
perplexity	5	5	5

YOUR BENCHMARK SCORECARD

Use the scorecard below to establish a composite baseline for your firm’s marketing and brand performance. The categories reflect all three dimensions of this framework — qualitative, quantitative, and AI readiness — weighted by relative impact. Score each category from 1 to 10, multiply by the category weight, and sum the results for your Composite Benchmark Score.

Category	Weight	Score (1–10)	Weighted Score	What to Assess
Brand Positioning & Message Consistency	15%			Voice, tone, value proposition, visual identity, and key differentiators are consistent across website, collateral, email, social, and sales materials. Internal alignment on positioning is clear.
Website Experience & Conversion Quality	15%			Monthly users, traffic sources, session duration, page engagement, mobile experience, site speed, calls to action, form completion, and conversion paths.
Search Visibility & Discoverability	15%			Organic search share, keyword rankings for brand and category terms, technical SEO health, indexed content, backlink quality, and visibility in relevant search results.
Content Strategy & Engagement	18%			Content cadence, topic relevance, thought leadership quality, audience engagement, downloads, video or webinar performance, time on page, repeat visits, and content relevance by segment.
AI Readiness & Authority Visibility	12%			Firm appears in relevant AI-generated responses. Content is structured for AI interpretability. Authority signals including credentials, media, third-party citations, and firm information are visible and consistent.
Social Marketing & Presence	10%			Follower growth trajectory, engagement rate on posts, content cadence, executive visibility, topic relevance, audience quality, and consistency with the firm’s broader positioning.
Email & Owned Audience Performance	7%			List health, deliverability, open rates, click-through rates, subscriber growth, segmentation, nurture activity, and content relevance by audience segment.
Lead Generation & Pipeline Attribution	8%			Defined funnel stages with tracking at each touchpoint. Lead scoring in place. CRM integration, source attribution, marketing and sales handoff, and automation deployed where appropriate.
Composite Benchmark Score	100%		/10	



How to Score Each Category

Score 1 – 3: Little to no activity in this area, no defined process, or significant inconsistency across channels.

Score 4 – 6: Foundational elements are in place but gaps exist in execution, tracking, or consistency.

Score 7 – 9: Strong execution with measurable results and defined optimization processes.

Score 10: Best-in-class performance with documented benchmarks and active continuous improvement.

Interpreting Your Score

Score Range	Interpretation
8.0 – 10.0	Strong marketing foundation. Focus on optimization and competitive differentiation.
5.5 – 7.9	Functional baseline with identifiable gaps. Priority areas warrant structured improvement.
Below 5.5	Significant opportunity exists. A structured benchmarking and brand audit is the recommended starting point.

How MBC Strategic Can Help

We understand how complex the world of financial services, marketing and branding is—as that is our singular focus. We help investment companies and managers to build out an authentic story and highlight their unique value proposition in a way that differentiates themselves from the sea of same in the industry.

With an investment branding history that dates back over 25 years, we have the tools, resources and talent that will get you started on setting up and establishing your own branding benchmarks. We can bring the necessary research, technology and strategies that will help make this a streamlined process. We can help give you a baseline to measure your marketing efforts and more solidly demonstrate the value that good marketing can generate across detailed marketing analytics reports and insights.

Investors—whether retail or institutional—need a sense of trust and confidence with your firm and understand the value of your investment offerings. The firms that stand out are those that have precise benchmarks in place to measure those needs against the industry and make educated and thoughtful adjustments to improve their marketing performance over time.

Setting benchmarks for your investment branding and marketing efforts is important. If you're interested in how to set, measure and outperform those benchmarks, reach out to us on our website, www.mbcstrategic.com.