CLIFTON BRIDGE
GROUP

ILLUSTRATIVE CAMPAIGN STRUCTURE

A Media-Led Recruitment and Acquisition Campaign

How Clifton Bridge Group designs an integrated adviser-facing campaign — from podcast to qualified conversation. An anonymised illustration of a live engagement.

ABOUT THIS DOCUMENT

An illustrative campaign - not a live proposal

This document is an anonymised version of a real campaign structure designed by Clifton Bridge Group for a UK national advisory firm. Names, brands and commercial figures have been removed. It is shared as an illustration of how we approach integrated recruitment and acquisition campaigns for ambitious firms - not as a proposal for any specific reader.

> *The firms and advisers we want to attract are approached constantly. The challenge is not having a good proposition - it is getting that proposition in front of the right people, in the right way, often before they describe themselves as in the market.*

BACKGROUND AND THE GROWTH OPPORTUNITY

Our illustrative client is a national advisory firm entering a significant growth phase, with an ambitious five-year plan to materially increase adviser headcount and assets under management. That level of growth cannot be delivered through traditional recruitment activity or standard acquisition outreach alone.

Today	5-Year Target	Strategic Implication
Mid-hundreds of advisers	2-3x adviser headcount	Cannot rely on inbound or contingent recruiters alone.
Multi-billion £ AUM	2x AUM growth	Requires both recruitment and acquisition throughput.

The bigger opportunity is to reach advisers and firm owners earlier in their thinking - those who may not yet describe themselves as 'in the market', but who could be open to the right conversation if the firm's model is positioned clearly and credibly.

STEP 1 - ARTICULATING THE PROPOSITION

The Client's Key Strengths

Before any media work begins we identify what the market actually needs to understand. For this illustration, the firm's real strengths sat across five themes:

Strength	Why it matters
A Flexible Adviser Model	Employed, self-employed, AR and commercial division structures - advisers met where they are rather than forced into one model.
Full Operational Support	Admin and paraplanning support that frees advisers to focus on clients, new business and growth rather than paperwork.
Lead-Generation Advantage	Proprietary lead technology delivering pre-qualified client opportunities - a differentiator versus networks and consolidators that offer little growth support post-transition.
Credible Succession and Exit Route	A clear, fair and defined exit route for advisers and firm owners thinking about the long-term future of their business.
A Strong Platform for Restricted-Network Partners	A credible alternative for partners frustrated by culture, flexibility or the internal sale process at large restricted networks.

CAMPAIGN OBJECTIVES

#	Objective
01	**Raise Awareness** Build wider awareness of the adviser proposition among the right people.
02	**Position the Firm as a Growth Destination** Establish the firm as a serious, credible choice for experienced advisers seeking growth.
03	**Engage Advisers Considering a Move** Reach advisers reassessing their current firm, network or structure.
04	**Reach Advisers Not Yet Actively Looking** Engage advisers open to the right conversation before they enter a formal process.
05	**Identify Succession and Acquisition Opportunities** Surface advisers and business owners interested in succession, sale or transition.
06	**Generate Warm, Trackable Leads** Create research insight and qualified leads the firm can use commercially for follow-up.

STEP 2 - THE CAMPAIGN THEME

'The Modern Adviser Growth Model'

Flexibility, leads, support and succession. The campaign explores what advisers really want from a firm or acquirer today. It should not feel like an advert - it should feel like a credible market conversation, with the firm leading the debate.

Possible angles included:

- Why advisers are reassessing their current firm or network.
- The limitations of traditional recruitment and acquisition models.
- What experienced advisers want from their next move.
- How firms can support advisers with admin, paraplanning, leads and client acquisition.
- Why succession planning needs to be clearer, fairer and more adviser-friendly.
- Why flexibility is increasingly important.
- What advisers should consider before moving firm, joining a consolidator or selling their business.

THE CAMPAIGN STRUCTURE: HOW IT ALL CONNECTS

The podcast acts as the anchor, but the wider campaign creates a full adviser-facing funnel - from awareness through to qualified recruitment and acquisition conversations. Each stage builds on the last.

Stage	Purpose
01 · Podcast	Builds trust and explains the proposition credibly in a format advisers already engage with.
02 · Social Content	Extends reach over several weeks, targeting advisers who may not listen to the full episode.
03 · Survey	Creates engagement, market intelligence and warm lead capture from a wider adviser audience.
04 · Insight Report	Turns the campaign into a market-intelligence project and provides ongoing content for follow-up.
05 · Webinar	Creates a direct conversion opportunity and a clear route for interested advisers to engage.

STEP 3 - CORE CAMPAIGN ELEMENTS IN DETAIL

Each element earns its place in the funnel

1. Flagship Podcast Interview

The firm's senior recruitment leader appears on The Financial Planner Life podcast for a full interview covering the firm's model, growth strategy and adviser proposition - including their lead-generation technology, how the firm approaches recruitment and acquisitions, and what types of advisers and firms they are looking to speak to. The client has full review and sign-off before publication.

2. Social Content and Video / Audio Clips

The podcast is repurposed into 30+ short-form clips and quote-led assets for LinkedIn and wider social distribution. Content covers key talking points around lead generation, flexibility, succession, admin support and life after a restricted network - making the campaign visible over several weeks rather than relying on a single release.

3. Adviser Market Survey

A short adviser survey to gather insight and identify potential leads - exploring whether advisers are considering a move, how important lead generation is, whether they are considering succession or sale, and whether they would be open to a confidential conversation. Provides both market intelligence and warm lead capture.

4. Insight-Led Article or Short Report

Survey findings are turned into a credible insight report - positioned around what advisers really want from their next firm. Working titles include 'The Adviser Growth Gap' or 'Beyond Recruitment: What Advisers Need From Their Next Home'. Turns the campaign from a promotional exercise into a market-intelligence project.

5. Follow-Up Webinar

Hosted by Financial Planner Life / Clifton Bridge, with the client's lead spokesperson. The webinar covers survey findings, the adviser proposition, growth, support, succession and exit - culminating in a Q&A and a clear invitation for confidential follow-up conversations.

6. Lead Capture and Follow-Up

Leads come from podcast engagement, survey responses, webinar registrations, direct enquiries and referrals. Clifton Bridge supports identification, qualification and introduction of suitable opportunities. The focus is not just volume - it is creating a better quality of conversation with the right people.

WHO THE CAMPAIGN WAS DESIGNED TO REACH

Target Audience

The campaign is aimed at a carefully defined audience - with particular focus on advisers who are not yet actively in the market but are beginning to think about their options.

Primary Targets	Acquisition Targets
• Experienced financial advisers • Restricted-network partners considering their next move • Advisers frustrated by lack of support, admin burden or limited flexibility • Advisers who want better lead-generation support • Advisers who feel they are not growing as quickly as they could	• Business owners considering succession • Firms considering sale or acquisition • Advisers not yet actively looking, but open to the right conversation • Advisers who want to understand what alternative models are available

> *The most valuable segment: the best opportunities rarely come from people already openly in the market. They come from advisers and business owners just beginning to think about their options - that is where content, research and trusted audience engagement earn their keep.*

INDICATIVE TIMELINE - 8 TO 10 WEEKS

Phase	Activity	Description
Phase 1	**Planning and Positioning**	Agree campaign theme, messaging, target audience and key calls to action.
Phase 2	**Podcast Recording**	Record the flagship Financial Planner Life episode.
Phase 3	**Editing and Approval**	Edit the episode and provide the final version for client review and sign-off.
Phase 4	**Launch and Promotion**	Publish the episode and begin social, email and audience promotion.
Phase 5	**Survey Campaign**	Launch adviser survey, using podcast, social and email content to drive responses.
Phase 6	**Insight Content**	Turn the survey findings into an article or short report.
Phase 7	**Webinar**	Run a follow-up webinar using podcast and survey insight as the basis for discussion.
Phase 8	**Lead Follow-Up**	Review responses, registrations and enquiries; identify suitable recruitment and acquisition conversations.

WHAT THIS KIND OF CAMPAIGN DELIVERS

Expected Outcomes

The campaign is designed around commercial outcome rather than just content output. Typical outcomes from a campaign of this scale:

Outcome	What it looks like
Adviser Visibility	Strong reach across the adviser market through podcast, social and email promotion.
Survey Responses	Targeting 50-150 adviser survey responses providing market intelligence and warm leads.
Webinar Conversion	A meaningful share of registrants converting into direct follow-up conversations.
Recruitment Outcomes	One or more recruitment or acquisition outcomes over the following months arising directly from campaign activity.
Market Intelligence	An insight report and survey dataset the client can use commercially well beyond the campaign itself.

COMPLIANCE AND APPROVAL

The client retains full visibility and control over published messaging throughout. Content stays authentic and engaging, while the client is comfortable with the final message before anything goes live: agreement on theme and key messages, recording, editing, client review and sign-off, survey question approval, webinar positioning, and final content review prior to release.

WHY THIS APPROACH WORKS

Traditional recruitment and acquisition outreach is difficult because advisers are approached constantly. A media-led campaign gives the firm a different route into the market - leading a broader conversation about what advisers need from the next stage of their career or business.

Mechanic	Why it works
The Podcast Builds Trust	Advisers engage with an in-depth interview far more readily than with a cold approach.
Social Content Extends Reach	30+ clips and assets keep the firm visible over several weeks.
The Survey Creates Engagement	Advisers not ready for recruitment messaging will engage with a broader market discussion.
The Webinar Creates Conversion	A live event gives interested advisers and owners a clear, low-pressure route to engage directly.
Follow-Up Turns Activity Into Outcomes	Warm, trackable leads are converted into meaningful recruitment and acquisition conversations.

IF THIS IS THE KIND OF CAMPAIGN YOU WANT TO RUN

Talk to Clifton Bridge

Every campaign we run is bespoke - designed around the firm's growth ambition, the audience we need to reach and the commercial outcome that matters. If you are a CEO, MD or Head of Recruitment for a UK financial services firm and this is the kind of conversation you want to have, we'd welcome an introductory call.

Clifton Bridge Group
Financial Services Recruitment and Acquisition. Done Better.
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> *Clifton Bridge Group - a media-led approach to recruitment and acquisition in financial services.*