



THE FINANCIAL ADVISOR'S GUIDE TO DIGITAL MARKETING AND PROSPECTING

Take advantage of the most powerful
marketing techniques working right now

- Attract new clients
- Cultivate referrals
- Amplify your brand in your target markets.



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DIGITAL MARKETING SIMPLIFIED



Website Evaluation



Website Upgrade



Search Engine Optimization (SEO)



Pay-Per-Click Advertising



Social Media Marketing



Content Marketing



Content Marketing Quick Start Guide

At this very moment, everything is changing in financial advisor marketing. Digital marketing and virtual prospecting are some of the newer ways to market your valuable services. However, these newer marketing methods can seem a bit overwhelming. This guide is designed to walk you through the most important elements, give you best practices, and unwind the complexities.



Take Inventory

As you begin, take inventory of your current digital assets. These assets typically include your website and social media presence.

Are you presenting a strong value proposition, consistent messaging, and a powerful brand?

Improve Your Website Presence

There are two major upgrades you can make on your website without doing a complete overhaul.

1

Upgrade Your Website Messaging

Does your website messaging speak to your target prospects and their challenges? If not, consider adding messaging on how you serve clients – front and center on the website. Be bold!

Is your value proposition clearly identified (why you)? If not, tell the visitors to your site how you and your team are different and why. Think about why your current clients chose you.

Do you have attention-grabbing videos? A video is one of the most powerful ways of personally messaging your value.

Could you make the case for your business with LESS words and pages on your site? Consider getting rid of long paragraphs and using more headlines to attract readers.

2

Add a call-to-action to your website to engage prospects.

Add an offer for a report or even a planning session that is compelling to your target audience. These could include:

Download our newest report, “Insights to Help You Navigate This Unprecedented Period and Stay on Track to Your Goals”

–OR–

Contact us today about our FREE PLANNING SERVICES for executives facing furlough, layoff, pay reduction, and/or retirement postponed..

Search Engine Optimization (SEO)

To improve your website ranking, here are a few tips:

1. Sign up for Google My Business. This will build validity with Google and control what results appear when someone searches for your business.

2. Index Your Site on Google using [Google Search Console](#) to begin appearing in search results.

3. Share fresh content. Updating content on your website, including your blog, is one of the best ways to improve your site's SEO.

4. Create Backlinks (also known as "inbound links"). Backlinks are links from one website to a page on another website. Google and other major search engines consider backlinks "votes" for a specific page. Pages with a high number of backlinks tend to have high organic search engine rankings. How can you get backlinks?



Share your blog content and other relevant content on your social media sites linking back to your website. And, when others share your social content it creates links back to your website.



Make sure you are listed on relevant lists of financial advisors whether it is a fee-only list, state listing or even a local listing at the Chamber of Commerce. All of those create valuable backlinks leading to your site.



Write articles for other blogs or media outlets which will then link back to your website.

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Pay Per Click Advertising (PPC)

PPC, or pay-per-click, is an online advertising strategy where you can run ads on a platform such as [Google Ads](#), [LinkedIn Ads](#), [Twitter Ads](#), etc. You only pay a fee when someone clicks on it.

A good ad should have a **strong call to action**. That does not mean sharing a list of your services but sharing information that connects to the needs and wants of your target audience. For instance, the call to action could be to sign up for an interesting webinar, receive an interesting report (i.e. “The 5 Things You Need to Know When Retiring In Volatile Market Conditions”), or receive a free consultation with a particular outcome.

Within each platform there are different ad formats including:

- Search Ads
- Display Ads
- Video Ads

Regardless of the platform and ad format, the way that PPC works is mostly the same and is a fairly simple process:

1. Sign up to an advertising account with the platform.
2. Create ads and select the right targeting by adding keywords for particular target audiences (people that work at a company, have a certain job title, etc.).
3. Set the maximum cost you are willing to pay for each click.
4. Your ad goes into an auction with other advertisers who are bidding on the same keywords.
5. The auction determines the order in which the ads are shown.
6. You pay when someone clicks your ad.



Social Media Marketing

If you want to stand out in the sea of financial advisors, social media marketing should be a core component in your marketing strategy. Here are 3 critical tips:

1

Improve the Content You Post to Social

Content is relevant if it is timely, and/or of particular interest to a group of people or niche audience. ***You will know it is relevant and interesting if people like, click and share your content.*** The content could be...

- Lifestyle oriented
- Motivational
- Topic oriented to a particular segment for example:
 - Getting ready to retire
 - Saving for college for child or grandchild
 - Widows
 - Divorcees
 - Charitable or philanthropic oriented
 - Event oriented – either a local event in your community or something you are hosting
 - Relating to people in your office

2

Use LinkedIn Sales Navigator

One of the most profitable ways to reach new prospects is to use the vast resources of [LinkedIn Sales Navigator](#). It is a paid tool within LinkedIn that will help you build targeted connections, follow up, deliver valuable content, and schedule qualified prospect calls. [Social Advisors](#) has a program that will do it for you if you don't want to take the time to do it yourself.

3

Be Social

Social media marketing is effective because it is a social activity. People often do business with those they socialize with – and yes that could be on a digital platform too. Your content and presence should evoke trust and expertise, but prospects also want to know your story and personality. So, don't forget to show your personality and a little more of your "social" side.

Content Marketing

Bringing it all together! Every day we are seeing more financial advisors venturing into content marketing. Why? Well, it's a complete, albeit slightly complex, proven way to generate new, qualified prospects. So, let's go over the basics of what you need to know and how to get started.

How to use content marketing to attract your best clients

1

What is content marketing?

Content marketing is a strategic marketing and business process focused on creating and distributing valuable, relevant, and consistent content. Its purpose is to attract and retain a clearly defined audience and ultimately drive profitable customer action. It is a way to use content like blogs, articles, whitepapers, guides, videos, podcasts, webinars, infographics, ebooks, and social content to relay valuable ideas and create relationships – rather than explicitly selling a product or service.

2

What are common objectives of content marketing?

Content marketing uses a marketing funnel method for moving your prospects through six stages of engagement. You begin by gaining awareness, increasing exposure, driving people to your website, building your list, building your pipeline of qualified prospects and ultimately, generating new revenue.



3

The ABCD's of Content Creation

Here are some of the basics for getting started with content marketing.

- A. Specifically Define Your Target Audience:** What are their needs, wants, challenges, problems, questions, and interests? Where are they on social media (Facebook, LinkedIn, etc) and what may be interesting to them?
- B. Generate Interesting Content Ideas:** Using keyword research tools like [SEMRush's Keyword Magic Tool](#), [Google Keyword Planner](#) or [Ahrefs](#) (there are many more as well), determine the longtail keywords that your target audience could be using in their online searches. Longtail keywords are very specific and usually drive highly targeted visitors that are likely to be interested in your content. Then, write or record content and design offers using these longtail keywords.
- C. Promotion and Action:** Where will your content appear and how will people be able to take action? Will you use paid advertising on social media or search engines, or will you try to engage organic traffic to your content? Do you have an email list to share your content? And, finally, what call to action will you have to lead them further into your funnel? A report, whitepaper, checklist, etc?
- D. Content Workflow:** How will you manage the content you are planning on, what has been written or recorded, and how can you keep track of everything? We use a Content Workflow & Calendar in [Smartsheet](#). You can create your own. It could look something like this:

Target Publish Date	Target Audience	Topic Idea	Topic Description	Keyword Focus	Keyword findings	Writer	Project Initiated	Expected Completion	Writer Completed	Reviewer	Title/Subject Line	Placement & Date
2/1/20	Age 55+ Nearing retirement Executive position Chicago area	When is the best time to retire?	Educate on when is the best time and money needed to retire	Retirement	-How much do I need to retire? -How to retire early? -When can I retire?	Jane Smith	01/08/20	01/27/20	01/27/20	Sam Smith	The best way to calculate how much money you need to retire	-Blog Post-2/1/20 -LinkedIn Post w/link -LinkedIn Ad-2/2/20 -Email to prospects w/link-2/2/20

4

Capturing Information From Prospects

If people are interested in your content, use your call to action (free report, etc) to capture their email address. By capturing their email address, you can proactively reach back out to them in the future with an offer that meets their needs and/or continue to build and nurture the relationship. Also, it is best to capture at least a first name along with the email address so you can merge tags in your email system so that each email is personalized with the recipient's first name.

5

Nurturing The Relationship

Once you have captured an email address, it's time to nurture and build the relationship. You can do so by providing more value and increasing engagement over time. This can be done by delivering content they find interesting and continuing to offer your valuable calls to action.

You may send an email newsletter with your latest blog posts, provide a series of video tips for investing best practices, or invite them to an educational webinar you are hosting.

You also want to drive your leads to at some point take the final step in the content marketing funnel – to convert.

6

Convert Prospects Into Clients

Convert is the last stage in your content marketing funnel. You've led your prospect through consuming your content. You've given away as much valuable content as you can. Through your content, you've built trust, proved expertise and made a connection with your prospect. A conversation is the next logical step.

To enable this final ask, you want to make sure you have created an easy-to-access call to action to set up an appointment, have a conversation, or get started. After the lead schedules a meeting with you, they convert out of your marketing funnel and enter into the sales process where you close them and they become a client.

To get started executing the ABCD's of your content marketing campaign, consider using our **Content Marketing Quick Start Worksheet** (below) to help you prepare for a successful campaign.

QUICK START WORKSHEET

1. LIST TYPES OF CONTENT

(ie. Blog, Article, Whitepaper, Guide, Video, Podcast, Webinar, Infographic, Ebook, Social content)

2. OBJECTIVES FOR RELEASING CONTENT

What are your objectives for releasing content? Here are some possibilities:

- **Driving people to your website.** Determine where you are now and how many increased visitors you want per month.
- **Increased exposure.** Determine who you want to have more exposure with. Define the target.
- **Stay in touch with current connections and clients.** How many are there and what do you want them to do as a result of you staying in touch.
- **Building Your List.** If you want to broaden your pipeline of sales, one of the first places is through having a large list of qualified prospects. How many people on your list now and what is the growth of your list you would like to see each month?
- **Build your pipeline** of qualified prospects.
- **Generate new revenue.** How many new clients do you want to acquire by way of your inbound content marketing strategy? Define the demographic and psychographics of these new clients.
- **Become a reliable source** of information on: _____
- **Deliver valuable** and thought-provoking insights on: _____
- **Educate individuals** on: _____

Metrics:

- Increase website traffic +XX% year over year
- Add to the sales pipeline XXXX marketing-qualified leads per year
- Generate revenue of \$X in new business
- Acquire XX new clients

QUICK START WORKSHEET

OBJECTIVE 1:

METRICS:

OBJECTIVE 2:

METRICS:

OBJECTIVE 3:

METRICS:

3. CONTENT CREATION FRAMEWORK – THE ABCD’S

A. Define Your Target Audience

What are their needs, wants, challenges, problems, questions, and interests?

What do they read, where do they visit (Facebook, LinkedIn, Twitter, Instagram?)

QUICK START WORKSHEET

B. Generate Content Ideas

Keyword Strategy ([SEMRush's Keyword Magic Tool](#), [Google Keyword Planner](#) or [Ahrefs](#), and use the questions you hear from prospects and clients)

Develop 3 months of Interesting Topics

Develop Content Offer

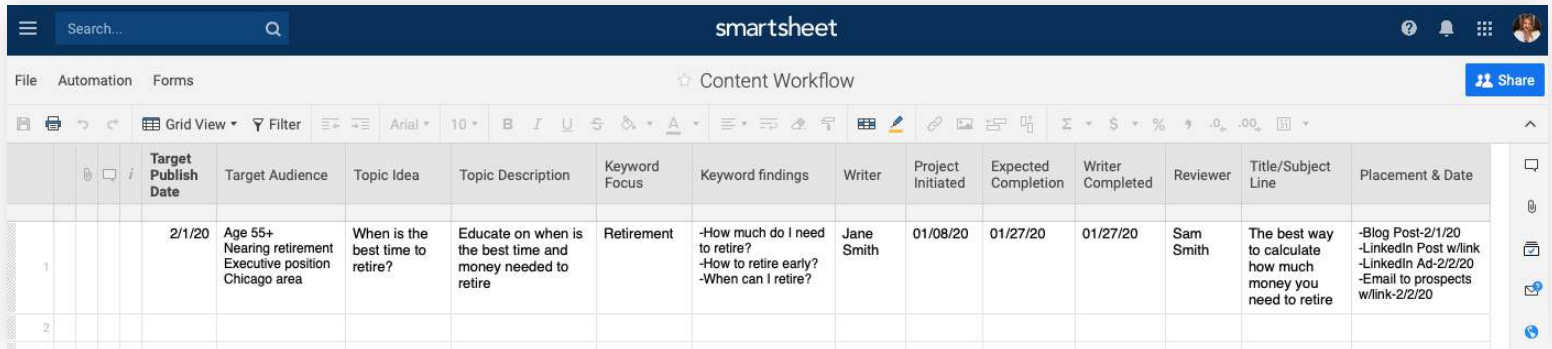
C. Promotion & Action

Placement

Call to Action

QUICK START WORKSHEET

D. Create Your Calendar and Workflow



	Target Publish Date	Target Audience	Topic Idea	Topic Description	Keyword Focus	Keyword findings	Writer	Project Initiated	Expected Completion	Writer Completed	Reviewer	Title/Subject Line	Placement & Date
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2													

- a) Target Publish Date
- b) Target Audience
- c) Topic Idea
- d) Topic Description
- e) Keyword Focus
- f) Keyword Findings
- g) Writer
- h) Project Initiated Date
- i) Expected Completion Date
- j) Write Completed Date
- k) Reviewer and Date Completed
- l) Final Title/Subject Line
- m) Placement and Date

Financial advisors will not reach today's prospects with the same marketing tactics and strategies that worked even one year ago.

With this guide, you now have information that will help you plan your digital marketing strategy and ensure that your firm continues to grow.