

# MARKETING MADE SIMPLE

AN EASY GUIDE  
TO PROMOTING  
YOUR BUSINESS



PLAN



CREATE



DELIVER



MEASURE



REVIEW

## DEVELOPING A SUSTAINED APPROACH TO PROMOTING AND BUILDING YOUR BUSINESS

Marketing is an intrinsic element of any advisory practice, at every stage of its development. Marketing can seem overwhelming and time consuming—but it doesn't have to be.

Marketing Made Simple is a step-by-step guide to successful marketing. Its purpose is to help you understand the elements that go into a sustained marketing effort, establish a process to manage those elements and adjust your program as your business develops. It's important to consider the steps that go into marketing, follow a plan and be consistent. This approach will build efficiency into your marketing program and deliver measurable results over time.

### Successful marketing can:



- ▶ Grow and deepen existing client relationships.



- ▶ Assist with retaining key clients.



- ▶ Attract partners, prospects and new clients.



- ▶ Sharpen your message with your audience.



- ▶ Build your brand in a meaningful way.

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## FIVE COMPONENTS OF MARKETING



### Make a Plan

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- ▶ Determine your goals
- ▶ Establish profiles for your ideal clients
- ▶ Develop messages that convey your unique value proposition



### Create the Content

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- ▶ Target the right prospect with content that compels action
- ▶ Think about issues from your clients' perspectives
- ▶ Determine which format you would like to use, e.g., white paper, video



### Deliver Content Through a Distribution Platform

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- ▶ Ensure it is easy to use
- ▶ Find one that's database-enabled
- ▶ Make sure it's compliance-friendly



### Measure and Analyze the Results

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- ▶ Gauge how many visitors come to your website and what pages they visit
- ▶ Track email open and click-through rates
- ▶ Review which calls to action were the most effective



### Review Your Marketing Efforts

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- ▶ Assess your initiatives
- ▶ Modify or terminate campaigns with limited success
- ▶ Expand on successes and try new ideas



## MAKE A PLAN

Implementing any marketing activity without a plan is like navigating a ship without a compass. Thinking about what you want to achieve will help you develop an effective strategy and focus on those activities that produce the best results.

### Determine Your Goals

Define your business goals clearly and concretely, and establish profiles for your ideal client (e.g., age, occupation, net worth, needs, personal interests). This essential exercise will clarify all your marketing efforts and ensure that your activities and resources are focused on achieving your business and marketing goals.

### Establish Messaging

What is your unique value proposition? In other words, why would a prospect hire you instead of another advisor? It may be your expertise in a certain area. It could be your personal touch or account reporting. Maybe it's your willingness to understand your clients' personal circumstances and to customize solutions. Highlight the three to five strongest attributes of your service that you want to get across when you first meet a prospect.

Firmly establishing your goals and messages will give you a solid foundation to build a marketing program.

For information on how to develop a unique value proposition, please visit our list of [additional resources](#).

## ANSWERING THESE QUESTIONS WILL HELP YOU MAP OUT YOUR MARKETING PLAN:



- ▶ What goals do you want to achieve?



- ▶ What type of clients are you trying to attract?



- ▶ Are you building your practice on investments, financial planning, or insurance?



- ▶ What demographic, industry or geographic area do you want to appeal to?



## CREATE THE CONTENT

Once you define your goals and value proposition, finding the right words is much easier. In this day and age, when attention spans shrink to seconds, the right words matter even more. Use short declarative sentences. Clearly explain the benefits of your service to the prospect or client. Think about issues from your clients' perspectives.

Content marketing is a proven and powerful means of marketing. Targeting the right prospect with the right words that compel action is the holy grail for all marketers.

## Format Matters

Maintaining a client's interest depends on selecting the right type of format and focus for your content: education pieces, tips or how-to guides that can provide practical advice for them. These types of materials continue to drive the question, "What can I do for you?" They help eliminate or mitigate resistance, build trust and allow you to demonstrate thought leadership.

### Content can take different forms, including:

- ▶ Emails
- ▶ Industry news and analysis
- ▶ Pre-approved content on ever-green topics such as retirement planning, saving for college, or investment approach
- ▶ Pre-approved or suggested tweets or LinkedIn updates
- ▶ Videos
- ▶ White papers
- ▶ Survey findings
- ▶ Newsletters
- ▶ Events like seminars, workshops, webinars and audio media such as podcasts
- ▶ Blog articles

## CONSIDER THESE FOUR SIMPLE STEPS BASED ON THE SALES CYCLE:



### 1 Awareness

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Determine what the audience will get from you. Focus on their pain points. Be as targeted as possible. Reinforce the value they are getting from you through this outreach.



### 2 Interest

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Keep it personal. Capture their attention with something of use for them.



### 3 Desire

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Embed a clear and compelling call to action.



### 4 Sale

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All of your hard work has paid off. You have now added a new client to your business.

## Consider what makes a marketing piece effective. Here is a checklist to get you started:

- ▶ **Have a call to action.** A call to action (CTA) is an image or line of text that prompts your visitors, prospects, and clients to take action. The action could be anything, but some typical CTAs include an offer to download a white paper, sign up for a webinar, attend an event, or request more information. Your CTA could be a specific offer. For example, if you are attending an event where you want prospective clients to schedule a meeting with you, you could offer them a Starbucks card or some other incentive.

In addition to having CTAs sprinkled throughout your website, be sure to include a CTA in your emails, blog posts, and other marketing pieces. Be sure your CTAs have links that can be tracked so you can see how many people clicked on each one. You can compare them and see which were the most effective.

CTAs are a great way to give prospects and clients the opportunity to engage with you and further the dialogue.

- ▶ **Offer information that is perceived to be high in value.** You will gain more traction with your audience, build trust, and be known as the expert in the field if you provide information that is highly useful to recipients. Think about what they are most interested in, what keeps them awake at night, or the particular challenges they face.
- ▶ **Be consistent in your communication.** A prospect typically needs to know you, your reputation, and what services and value you offer before they are willing to do business with you. It can take three to five contacts before you get an acknowledgment or response. Consistency of communication allows you to build a meaningful relationship, provided you are using different content pieces or offers in your outreach.
- ▶ **Capture personal information.** Use forms for newsletter subscriptions, webinar registrations, and select content like white papers, market outlooks, and any high-value long-form content. Forms can include any number of fields, but the more information you request, the less likely a prospect is to fill it out. Fields like First Name, Last Name, and Email Address should always be included, as well as any fields that are vital to your practice. You can also make some of your fields required and have some fields as optional, like phone numbers.
- ▶ **Be compliant.** You must adhere to policies and rules outlined by your firm. Contact your compliance department and obtain approvals for content and offers prior to distribution. Using pre-approved content offered by your firm can help lessen this hurdle. All of your marketing activities, including social media posts and email, should be properly archived.

## YOUR PRACTICE SHOULD HAVE A PROFESSIONAL WEBSITE



- ▶ People use the Internet to conduct research prior to selecting services. If you don't have a website, you are conceding a major advantage to your competitors.



- ▶ A website is your best calling card. In addition to providing an easy way for clients to refer you to their friends. It is a platform for all your marketing content, including brochures. You can direct potential and current clients to these items, saving you printing costs.



- ▶ There are plenty of options, some free, when it comes to choosing a platform to use to build your website. Choose one that is well-known and allows you to easily implement updates.



- ▶ Designing a basic website is easier than you think, but if you are feeling overwhelmed, you can choose to hire a designer. A better option is to use a service that helps you design and maintain your website. For example, as part of our offerings, we offer a platform/design suite through our partnership with Faulkner Media Group.

**For more information,  
about this service visit the  
FMG Suite website.**





## DELIVER CONTENT THROUGH A DISTRIBUTION PLATFORM

Often used interchangeably, a distribution platform or a content management system provides tools that allow users with little knowledge of programming to create and manage online content. A system can include tools for website development, content creation and maintenance, social media management, email distribution, and tracking.

Clients and prospects expect to communicate with financial advisors across multiple platforms. Mobile email is on the rise, as more than 50 percent of users now read their email over their smart phone or tablet. To ensure that your messages are reaching your audience, it is essential to create and distribute individual marketing pieces that can be viewed and responded to via the medium that clients desire, from desktops to mobile devices. Your website should also resize automatically so it looks great on any device.

### Some other key elements of a distribution platform:

- ▶ **User-friendly**—an interface and system that is intuitive and efficient.
- ▶ **Database-enabled**—allows for direct uploading and group differentiation for customized outreach.
- ▶ **Supports consistent communication**—regulates the timing of your outreach. Campaign pieces can be staggered and automated.
- ▶ **Efficient**—content is owned by you and accessible alongside pre-approved content provided by your firm or other service. It also allows others in your group to send out campaigns, letters or other content under their name so you can engage different members in your practice.
- ▶ **Faster compliance**—reviews content for compliance automatically, within a shorter time frame, and archives them for you. In addition to FINRA rules, you need to consider general best practices regulating email distribution or any other marketing activities. For example, all of your emails should have an unsubscribe option. Your platform should automatically remove an individual from your outgoing emails if they click on that link. A link to a page outlining your email policy is also useful. Some good policies include not sharing your emails with third parties and obtaining consent before sending promotional materials.
- ▶ **Supplies metrics**—provides tracking information and all key metrics within an easy-to-understand interface. It should also allow you to select certain metrics to track, provide a dashboard for quick analysis, and offer the ability to compile and export customizable reports.

For use with financial professionals only.



Platforms like Cetera Financial Group's Connect2Clients®, our exclusive turnkey marketing program, is designed to help build an advisor's business through thoughtful and consistent marketing.

## The Connect2Clients® Marketing Portal is:

- ▶ **A Comprehensive Platform**—Advisors can distribute content through multiple channels all in one location
- ▶ **A Marketing Library**—Find financial and non-financial pre-approved content using our list of recommended ideas or search using key words
- ▶ **A Powerful Marketing Automation System**—Schedule and send a series of pre-approved emails and greeting cards in a variety of topics ranging from financial planning to connecting with client interests
- ▶ **A Seamless Compliance Workflow Engine**—In addition to pre-approved content, you can personalize any content by editing or adding your own custom content. All personalization is easily routed to ad review
- ▶ **A Website Content Provider**—Automated content posting, interactive calls to action, and designs that provide a custom look with the ease of implementing a template.



[Click here for more information about Connect2Clients.](#)



## MEASURE AND ANALYZE THE RESULTS

You have focused your content and powered it with a comprehensive distribution system—now it's important to analyze the results. Adopt a data-driven approach for your marketing outreach. Understanding who's receiving your content, ignoring it, opening it or taking action helps you effectively allocate your marketing time and resources.

### Key Metrics to Track



#### Websites/Blogs

Your distribution platform should provide these metrics:

- ▶ Number of visitors (“total visitors” includes visitors who have come to your site repeatedly, while “unique visitors” count each person only once).
- ▶ Pages that generated the most traffic. “Pages visited” is especially useful for your blog, since the content that attracted the most interest will help you determine your focus moving forward.
- ▶ Where your visitors have come from, such as from a referring website or from a tweet on Twitter.
- ▶ Google Analytics is a free tool that offers geographical information and other useful tracking.



#### Emails/Newsletters

- ▶ Open rates are a key metric for email. Usually expressed as a percentage, the open rate is a measure of how many people on your email list opened or viewed a specific email. The rate excludes emails that were not delivered because of an incorrect email address or other failed address. In the case of a 20 percent open rate, for every 10 emails delivered to the inbox, 2 were actually opened. Average open rates are between 15 percent and 25 percent, although the financial services industry generally has higher open rates. Establish a baseline for your list and see if certain subject lines or topics produce a higher open rate. Keep in mind open rates tend to fall as list size increases.

## GET TARGETED

Gone are the days of throwing items at the wall to see what will stick. There is too much white noise surrounding clients, too many advisors willing to be the voice of education who are easily accessible through technology. The tactics in this guide are meant to help your client connection become stronger, more frequent and more targeted in reach.





- ▶ Click-through rates are a great determinant of interest. Expressed as a percentage, this rate measures how many of the people who opened your email clicked on any of its embedded links. Average click-through rates are around 3 percent. As with open rates, determine your baseline and see if certain calls to action or other links attract more attention to provide insight into what appeals to your audience.

### Social Media



- ▶ Metrics for social media differ based on the channel, but typical metrics include number of followers/likes, number of engagements (tweets/likes), and clicks.
- ▶ Social media is good for branding and prospecting, but it is more difficult to tie metrics to results.
- ▶ If you are interested in metrics, you can use the channels' free tracking services, i.e., Twitter Analytics, Facebook Insights for fan and company pages, and LinkedIn's Analytics tab for company pages. Personal LinkedIn accounts also provide information such as who's viewed your profile and data on status updates and posts.

For all of your marketing efforts, look for ways to determine where you are getting prospects and how they are converting to clients. Examine and compare your channels (i.e., website versus LinkedIn account), and see if certain marketing pieces drove above-average results. For example, was there a white paper you promoted on LinkedIn that prompted three prospects to call you and set up appointments? This kind of information is critical in determining effectiveness.

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## REVIEW YOUR MARKETING EFFORTS

No single approach is perfect. View “failures” as learning experiences for the next time. The key is to have an approach in place that allows for flexibility so you don’t waste valuable time and miss opportunities.

Assess your content inventory every quarter. By setting up a formal review process, initiatives that had limited success can be modified or terminated. Successful marketing efforts can be intensified or expanded.

The ultimate goal is to create marketing content for readers to connect with and respond to. With content creation, patterns may emerge that will better suit your practice’s direction or uncover business growth opportunities.

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## WE CAN HELP

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Let us help you, step by step, through the process of creating and enhancing your content strategies so you can respond to the ever-changing challenges of shifting consumer behavior and modes of engagement.

Consumer demand for learning and insight is there, but attention spans are short. Advisors who can direct their communications to the needs and interests of prospects and clients will benefit the most from their marketing efforts.