Digital Marketing to Drive Leads

CGAN ACHIEVE CONFERENCE

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Topics We'll Talk About Today:

- Digital Marketing 101
- 3 Digital Marketing Must-Dos
- 2 Ways to Level Up your Digital Marketing Game
- Q&A

Meet Your Presenter:
Mel Angert
Director, Account Strategy at Intention.ly

- Oversee CGAN digital marketing, including demand generation and content development
- 15+ years experience in digital marketing
- Strong background in Fintech and financial services including banking and credit, financial advising, cryptocurrency, insurance, investments, lending, payments, and SaaS.

Digital Marketing 101

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What is Digital Marketing?

Digital marketing, also called online marketing, is **the promotion of brands to connect with potential customers using the internet and other forms of digital communication**.

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Deconstructing the Digital Landscape

Here's where your audiences have an opportunity to interact

Where are you promoting your brand right now?

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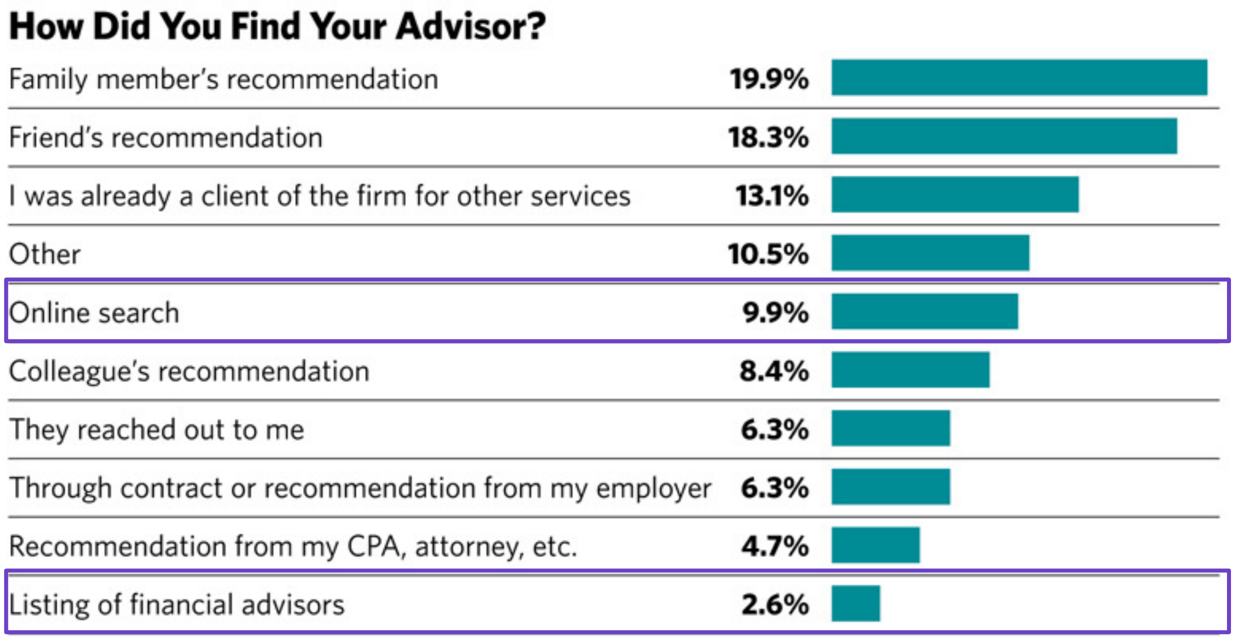
Why Invest in Digital Marketing?

If **you're not taking up space** in the digital worlds in which your audience lives, **your competitors will.**

Digital Marketing can help you...

- Attract new clients
- Engage and retain existing clients
- Build your profile in your community
- Recruit potential employees
- Position yourself as an expert in your field

Why Invest in Digital Marketing?

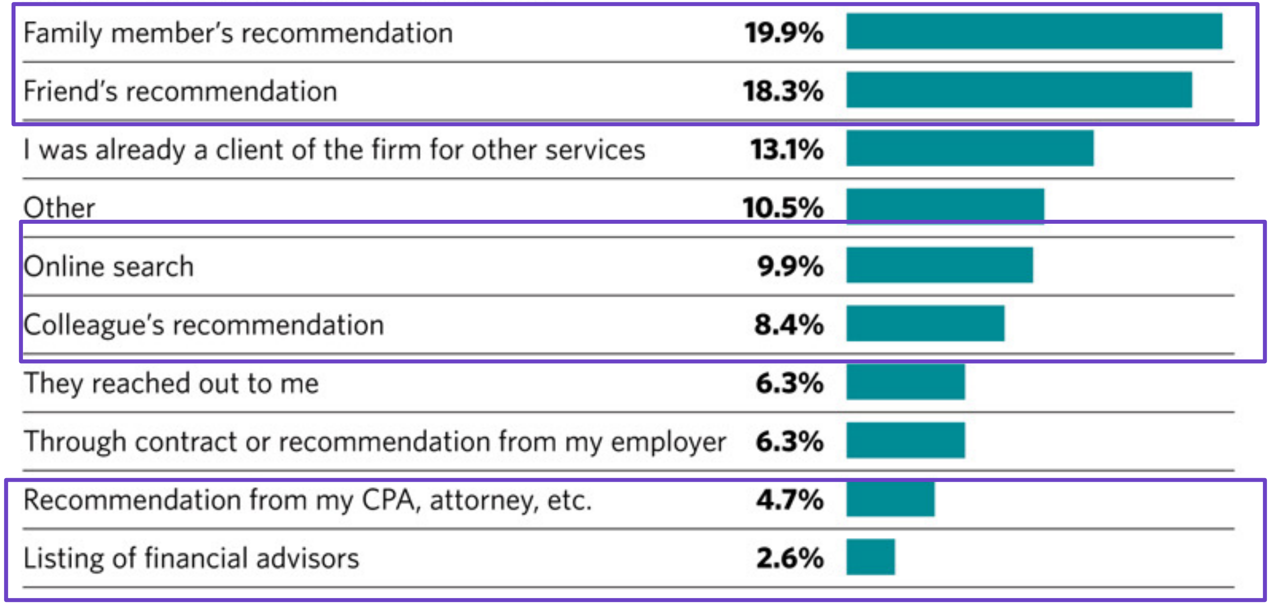


Why Invest in Digital Marketing?

In recent research conducted by AdvisorEngine, 66% of prospects were found to start the search for an advisor by asking for referrals…
but were then looking up each advisor online to select which one to contact.

Why Invest in Digital Marketing?

How Did You Find Your Advisor?



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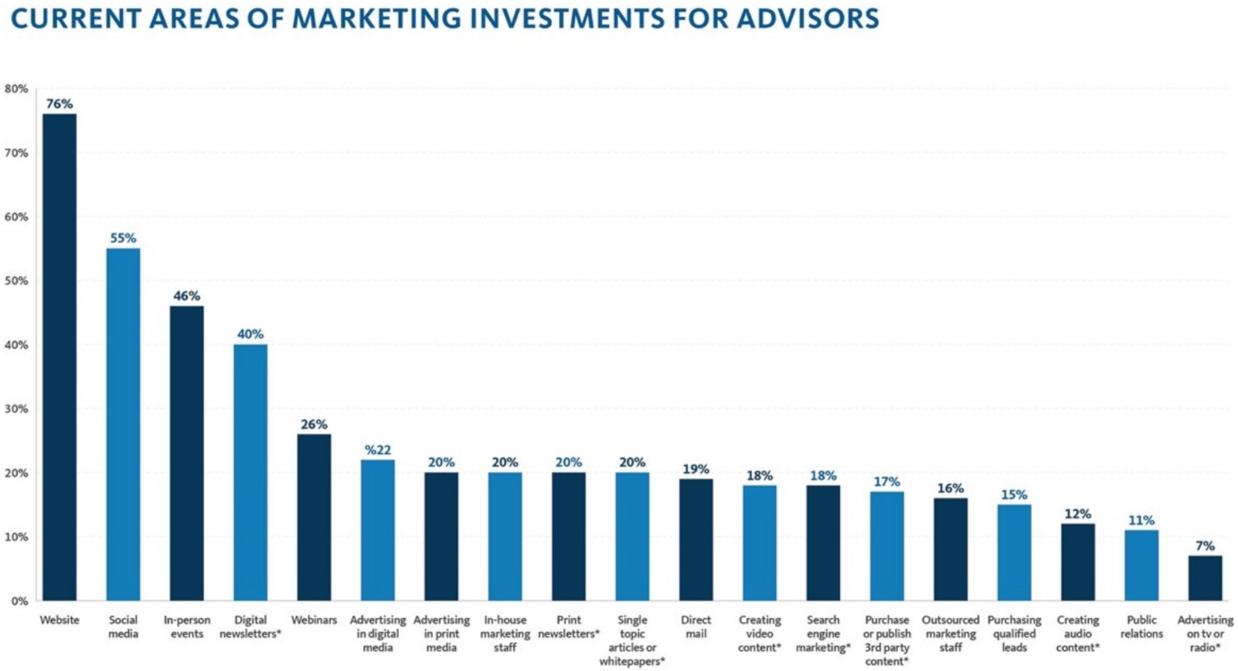

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Where to start?

3 Digital Marketing Must-Dos (and 2 to try out)

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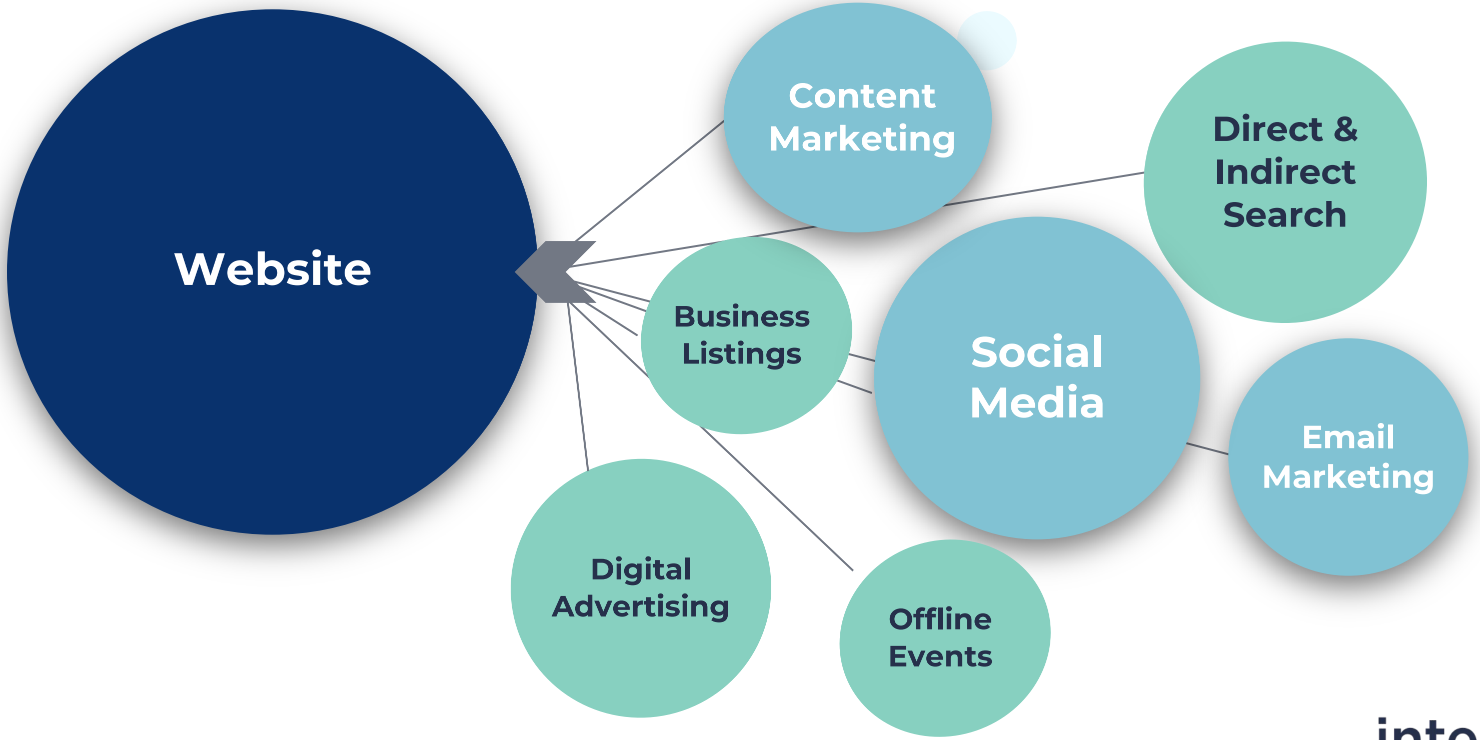
#1 Must-Do:
Your Website

Everything Digitally Returns to Your Website



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WHY IT MATTERS:

50 milliseconds

is the amount of time to make a good first impression on people visiting your site

57%

of website visitors won’t recommend a business if its site is poorly designed

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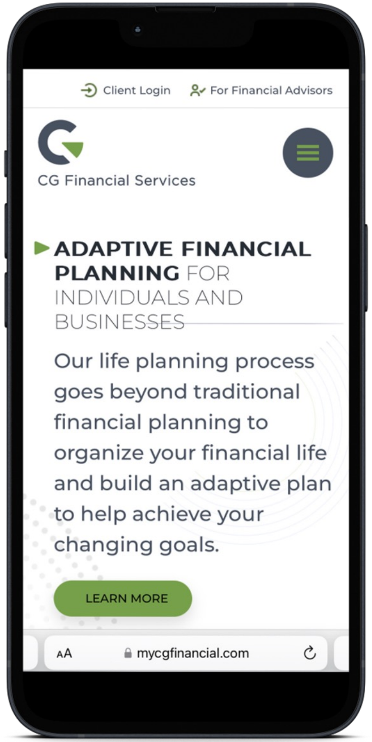
Website Best Practice: Think Mobile First

Over 59%

of people who interact with your site will do so from a mobile device

80%

of people visiting from social media will be on a mobile device



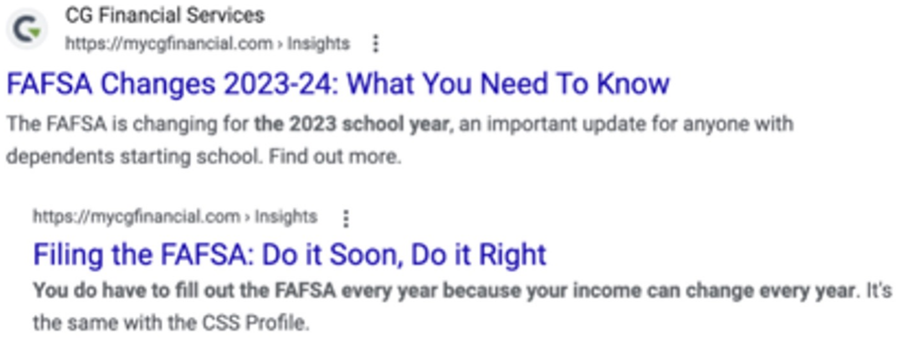
Website Best Practice:
Keep it Clean & Simple

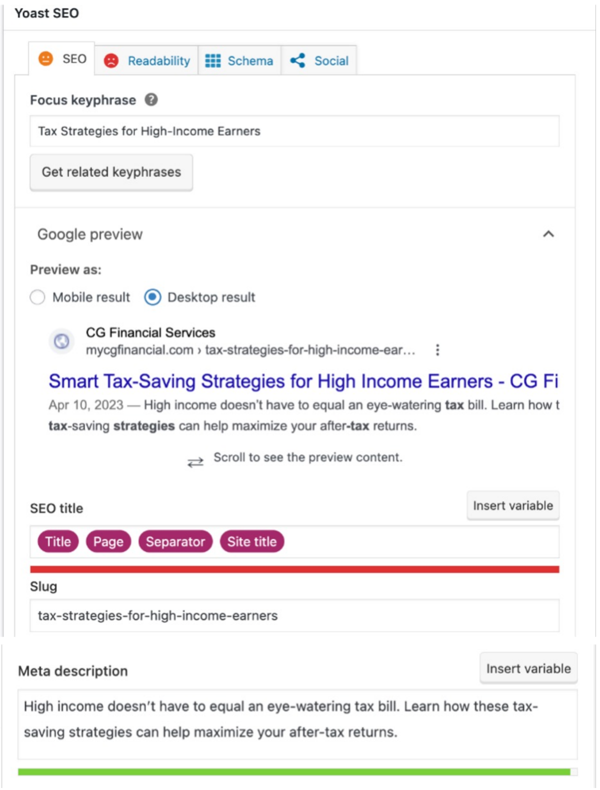
Your website should load quickly.
Your website should tell me instantly who you are and what you do.
Your website should minimize friction and make it as easy as possible for clients and prospects to find what they need.

- As a client, how do I login to my account?
  How do I make an appointment?
- As a prospect, how do I contact you?
  Where is your phone number?
  Your address?
  How can you help me?

Website Best Practice: Think SEO

- Metadata is simple and easy to populate with no expensive SEO investment
- YOAST SEO is free on WP





Website Best Practice: Think SEO

- Answer questions

Website Best Practice:
Think SEO

- **Incorporate local keywords when you can**
    - Education Planning for **Michigan** Families
    - Guide to Starting a Business in **Dallas**
    - Tax Strategies for High-Earners in **Boston**

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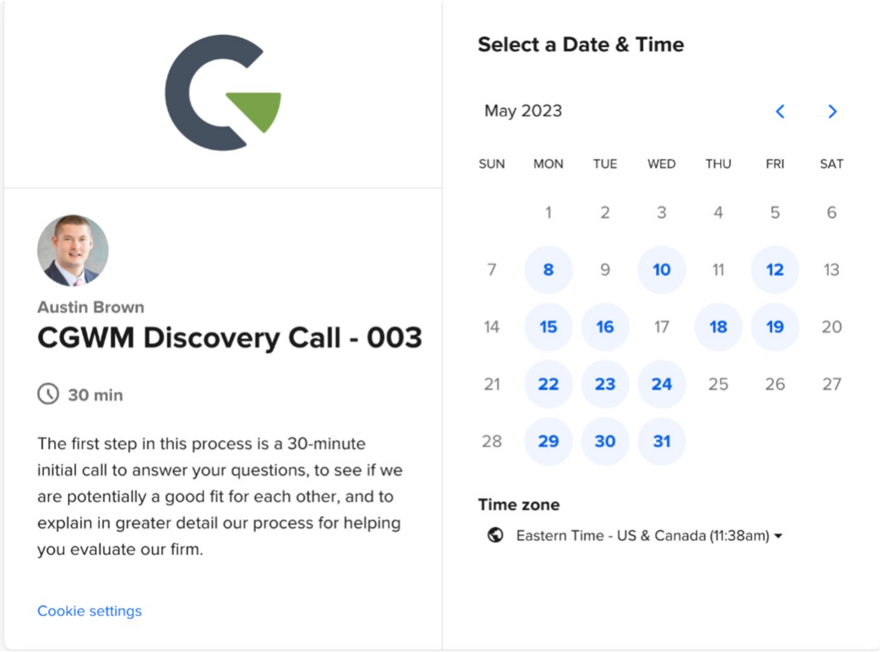
Website Best Practice:
Use Your Website to Gather Leads

- Have a subscribe button or pop-up for visitors to subscribe to your mailing list
- Incorporate booking capabilities on your site (Calendly, etc.)



Website Best Practice:
Use Your Website to Gather Leads 2.0

- Gate high value content like lead magnets to gather potential clients (require an email to download using a form)

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#2 Must-Do: Optimize Locally

Google My Business

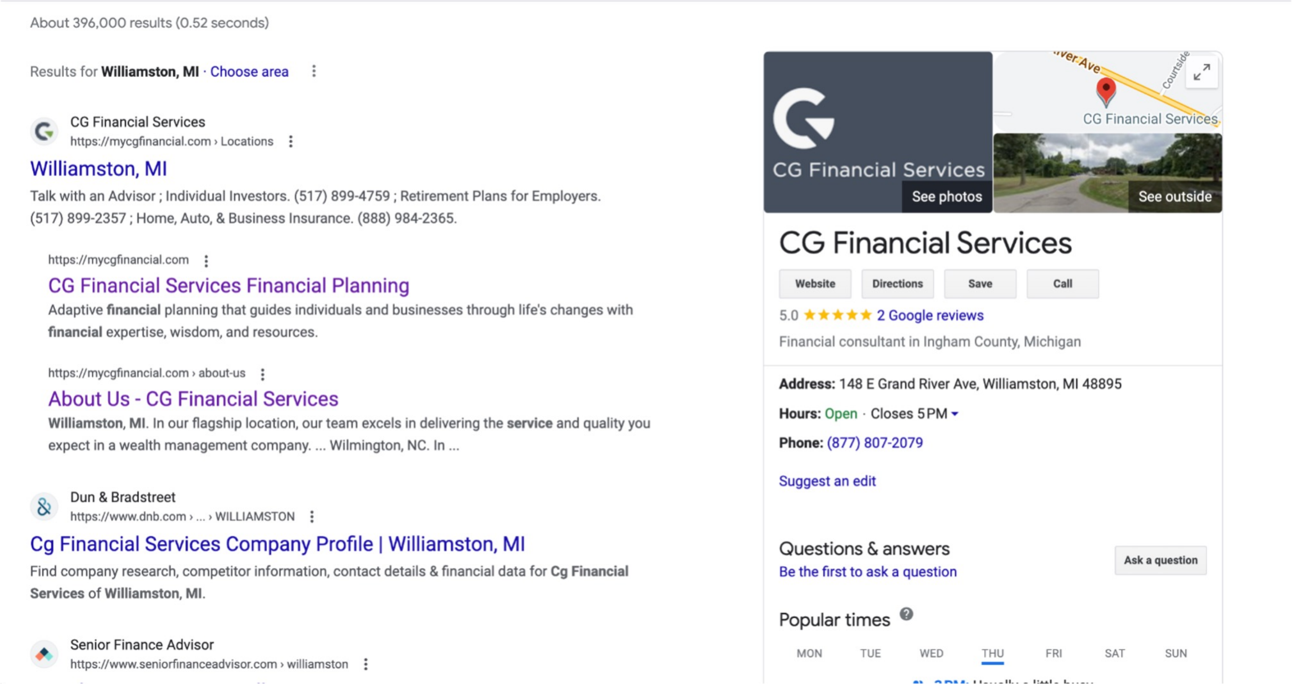
WHY IT MATTERS:

Your "Google My Business" listing serves as your firm's digital "storefront"

1. **Online visibility:** Makes it easier for people to find you when actively searching for a new advisor online.
2. **Builds trust:** Provides necessary information that helps a client choose your firm.
3. **Low investment, high reward:** Takes little time and effort to establish, but can provide a big payoff by attracting more new clients to your firm.

Google My Business Listing

Potential new clients are **2.7 times more likely** to consider your business reputable if you have a complete Google Business Profile.



Google My Business Best Practice: Claim Your Business (or New Listing)

- If a listing appears, but is not yet optimized or completed, it will include a link that says "Own this business?" Click on the link, and you'll be able to connect that GMB listing to your Google Business profile.
  OR Go to the website business.google.com/create and type in the name of your firm. Click on the option to "Create a Business With This Name."
- Google may send a postcard with a verification code to your address to verify ownership
- To finish, select either "Financial Planner" or "Financial Consultant" as your category of business and fill out the remaining form fields as accurately as possible

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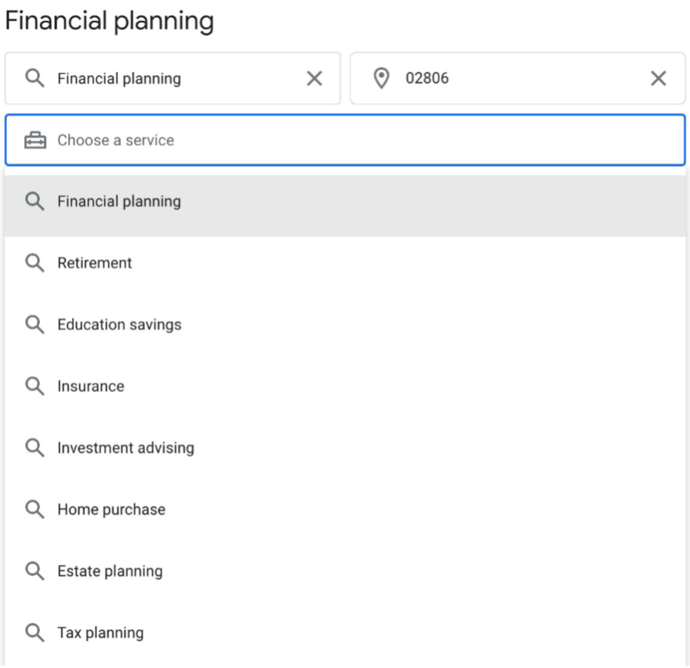
Google My Business Best Practice: Optimize Your Listing

To complete and optimize your profile, add pertinent information such as:

- A link to your website
- Hours of operation
- Phone number
- Business Description
- Photos*
- List of Services***



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Google My Business Best Practice: Ask for Reviews

A good review can be the deciding factor that tips prospective clients in your favor. But did you know good reviews also help **improve your ranking in Google**?

- After a great quality touchpoint with a client, send them a link to leave a review
- The SEC recently changed its rulings on marketing practices for financial advisors. Now, financial advisers are allowed to use Google reviews in their marketing. BUT always clear with compliance first!

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Get Google Screened

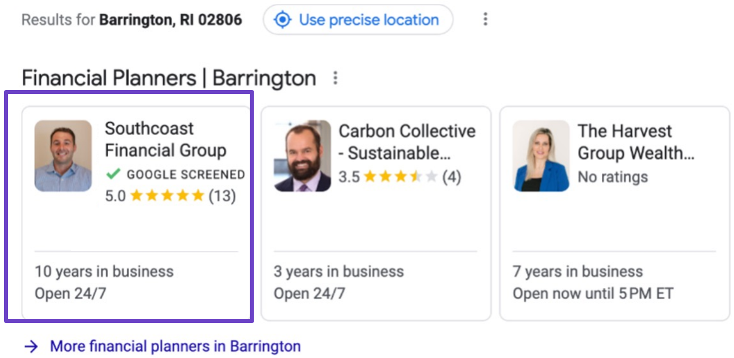
WHY IT MATTERS:

Social Proof from Google

Becoming Google Screened is **FREE,** means you **rank higher in search results** and get an **eye-catching green check mark** next to your listing, both of which are factors that can serve to increase trust from potential clients—and get your listing noticed by curious prospects

Google Screened: Social Proof from Google

1. The only way to become Google Screened is to apply for a Google Local Services Ads account. It’s free, simple and only takes a few minutes.
2. To get Google Screened, your firm must have a 3-star rating or higher on Google.
3. Step Three: Pass a Few Background and License Checks



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Other Local Options: Yelp

Follow these steps to claim your Yelp listing as a single-location business:

- Go to Yelp.com.
- Click “Manage my free listing” to claim your listing.
- Enter your zip code and business name to find your location.
- If your company already has a listing, the name will show in a drop-down box

Other Local Options: Better Business Bureau

Follow these steps to claim your Better Business Bureau listing as a single-location business:

- Go to BBB.org and look for the globe icon in the upper right corner of the site.
- Click the globe symbol, then enter your city, state, or zip code.
- Click the “Set Location” button.
- The BBB website will now solely display statistics from your specific location.

#3 Must-Do:
Get Social

Social Media

WHY IT MATTERS:

Meet Your Prospects Where They Are

93.4% of internet users are on social media

70% of investors reallocate investments or change connections with financial providers based on content found on social media

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Social Media Best Practices: Which Platforms to Use?

1. **LinkedIn** - Business Page & Your Personal Profile
2. **Facebook** - Business Page
3. **YouTube** - Business Channel
4. **Instagram** - Business Profile
5. **Twitter** - Personal Profile
6. **TikTok** - Personal Channel

What audience are you targeting?

78% of baby boomers are active on Facebook.
67% of baby boomers are heavy users of YouTube.
31% of baby boomers are active on LinkedIn.

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Social Media Best Practice: Optimize your Profiles

1. **Fill out your entire profile** - address, phone, website, profile photos
2. **Focus on keywords** - social media is a powerful search engine. Use your profile for SEO
   NO: “Financial Advisor”
   YES: “Financial Advisor in Lansing Michigan”
3. **Focus on Action:** CTA button should be Contact us or (if you have online booking) Book Now

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Social Media Best Practice:
When it Comes to Content, Less is More

Post high-quality, relevant content.
1 quality post a week > 5 mediocre posts

- The best time for click-throughs averages around 1 to 4 p.m.
- On average, Wednesday has been proven to be the best day
- The worst time for click-throughs, on average, is on the weekends between 8 p.m. and 8 a.m.

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Social Best Practice:
Not Sure What to Post?

1. Use your own voice, not industry jargon
2. Post practical, applicable information
   a. Educate, connect and inform
   b. Keep it simple and short
   c. Link back to your website whenever possible
3. Follow industry thought leaders to stay informed of trends and topics
4. Answer questions you're hearing from clients
5. Reuse, Repost, Recycle!

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Social Media Best Practice: Think Local

1. Connect with local clients by focusing on your community
    a. Spread the word about community events/charities you support
    b. Tag local businesses, organizations, schools in your posts to increase visibility
    c. Share accomplishments, awards, news articles, etc.

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Level Up:
Digital Advertising

Digital Advertising: Think Local

WHY IT MATTERS:

Opportunity to Stand Out

Only 22% of financial advisors use digital advertising

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What is Local Targeting?

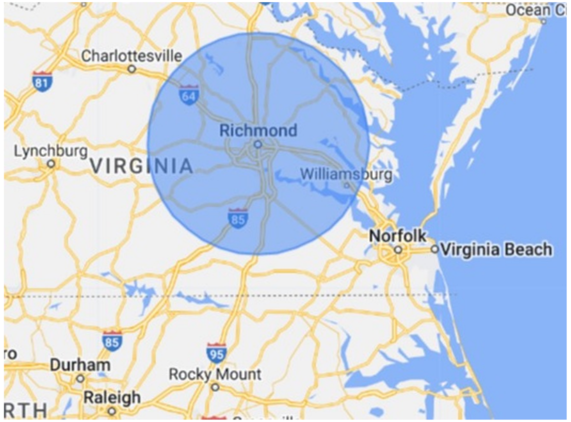
Local advertising, sometimes called geo-targeting, is a form of **targeting by location** that lets your ads only appear to customers in a certain physical place, or set of places, that you specify. That way, your money goes to the right place every time.

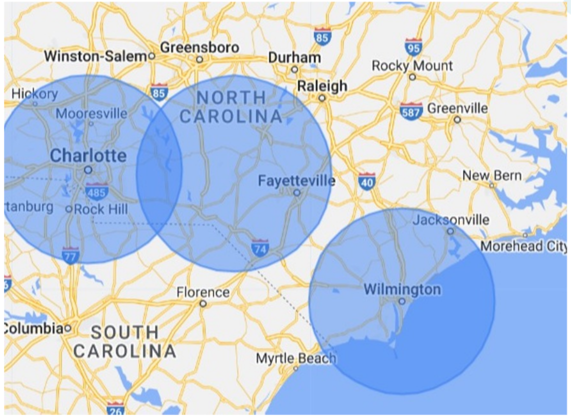
Think of geo-targeting as the tech-savvy grandson of direct mail marketing.

How to

On Facebook, you can target

- Countries (up to 25)
- States
- Cities (up to 250)
- Congressional districts
- ZIP or post codes (up to 50,000)





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Best Practices for Targeting

If you're going after high-earners, target more affluent zip codes

Add additional parameters to location (age, interests) – get creative to target high earners in those areas

Include the name of your target location in your ad copy (Financial Planner in Providence)

Get specific in your niche (Boston Financial Planner for Entrepreneurs or Small Business Financial Planner in Dallas)

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Sample Targeting Parameters

Location	Gender	Age	Interests/In Market For	Income	Estimated Total Audience Size
50 mile radius of office location	Male/Female	35-65+	• Investing • Asset management (business & finance) • Investment management • Investment strategy • High-net-worth individual • Tax planning • Estate Planning • Business/Finance	Top 5% of zip codes	Depends on location

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Before You Jump into Ads: What to Know

- Start slow. START LOCAL.
- Start with a budget of at least $300/month
- Start with 2-3 variations of ad creative and copy
- Stop and look monthly at results:
  - What images are getting the most clicks?
  - What copy is getting the most clicks?
  - What is driving the most leads?
- Don't go above $500/month until you've thoroughly tested your campaigns and targeting
- Don't let your ads get tired - refresh at least quarterly

Best Practices for Ad Creative

- Focus on the client - not yourself/your firm
- Advertise the problem, show how you are the solution
- Don't give too much away in your ad
  - **Curiosity is one of the biggest motivating factors** to getting people to take action
  - "Find out how to retire with more money than you ever thought possible." vs "Get Retirement Planning Services."
- Don't ask too much, too soon
  - Prospects don't know you yet with a single ad, don't drive directly to Book a Call.
- **FOLLOW UP WITH LEADS**

Level Up:
Nurture Leads with Email

Email Marketing

WHY IT MATTERS:

306 billion emails are sent each day

8% is the average conversion rate with email marketing

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Email Best Practices:

- Offer an incentive to opt-in (newsletter, download)
- Focus on value for time investment
- Find your timing sweet spot
  - Best days: Tuesday, Wednesday, Thursday
  - Best times: 10am, 6am
- Follow compliance rules
- Don't over do it

Email Best Practice:
Nurture Leads

- **Offer a Piece of Relevant Content/Information**
  - A blog post, a download, a webinar, an in person event invite
- Showcase your service offerings
- Show your value prop
  - How are you different? What unique our value proposition? How your business fills a need, the specific benefits clients can expect, and why you—and not your competitor—should win their business.
- **Include a CTA**
  - Schedule a call, etc.

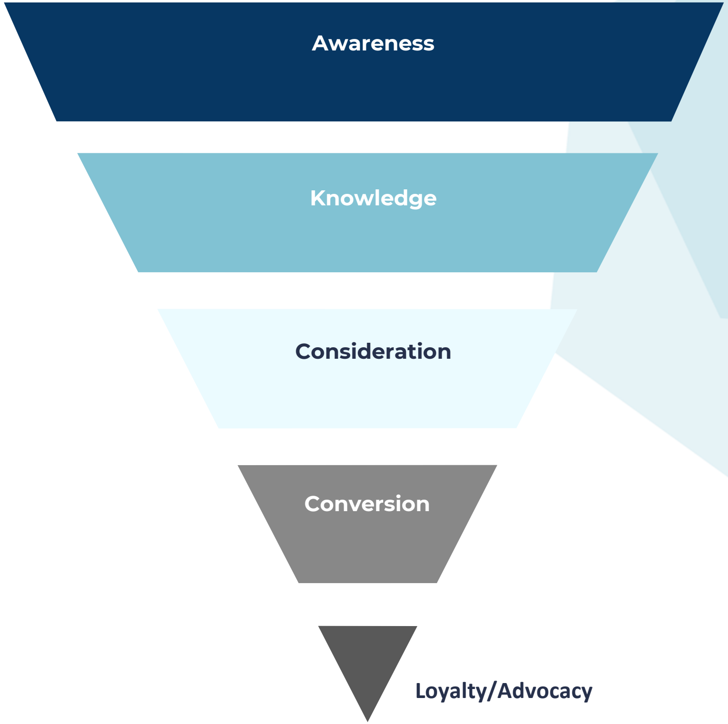
Sample Email Nurture Sequence

- Welcome to CG Financial Services
- Our Service Offering

- Meet the Team
- When do you need a financial advisor?

- Client Testimonials
- What to expect when you work with us

- Schedule a Complimentary Consultation



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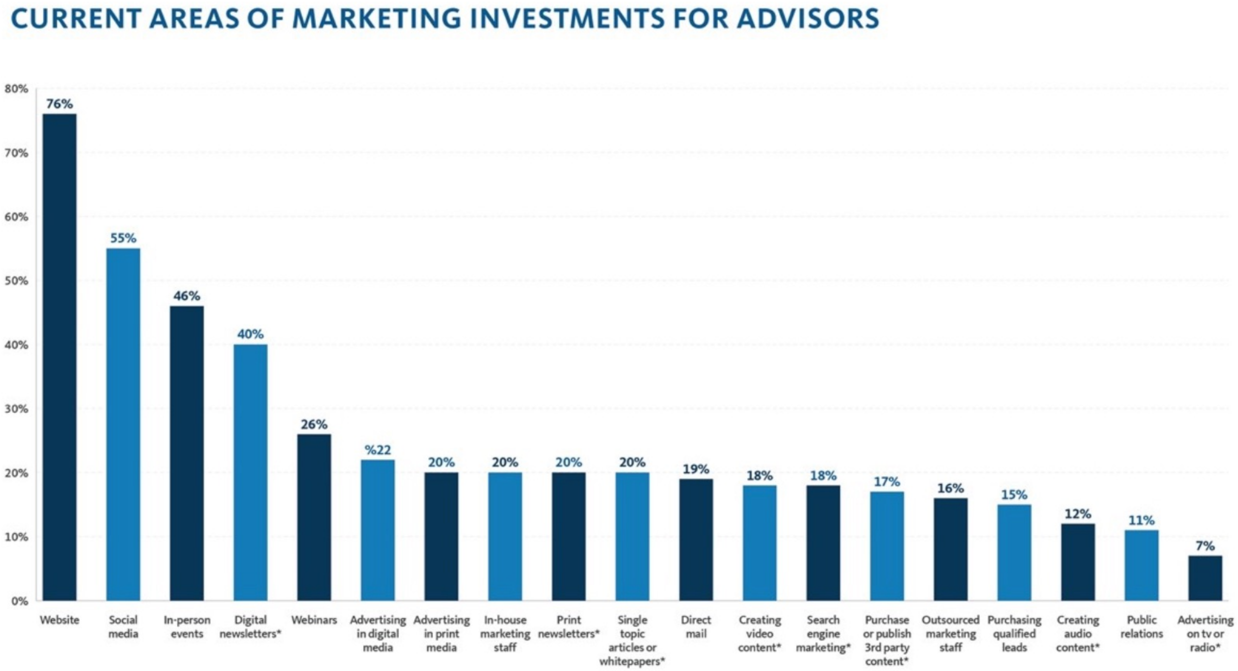

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Q & A

Stay In Touch

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