



**SYMMETRY ADVISOR STRATEGIES**

# 4 Digital Marketing Essentials



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## Introduction

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Since the first clickable web banner debuted in 1993, digital marketing has evolved into an essential strategic pillar of successful marketing for almost every business.

For Financial Advisors, digital marketing is key to both growing your practice and showcasing your credibility as a reliable resource for financial advice. While digital marketing encompasses everything from marketing automation to videos and webinars, a successful digital marketing strategy should—at minimum—include and integrate these

### **4 key components:**

- 1. Websites**
- 2. SEO**
- 3. Social media**
- 4. Online ads**



In this Guide, we'll explore each of these components and how to utilize them effectively in your overall marketing plan.

## **Let's get started!**

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## 1. Your Website

**More and more investors are finding their financial Advisors via the web. Even referrals are likely to check out your website before deciding whether to call you.**

This is why your website must **simply and concisely highlight how you make a difference for investors.** Above all, this means clearly articulating your value and being as specific as possible about who you help. According to Schwab's 2020 *Benchmarking Study*, firms with a documented ideal client persona and client value proposition **attracted 28% more new clients and 45% more new client assets** in 2019.

### Website Best Practices

#### Clearly articulate your value

Your value proposition should be featured prominently on your website homepage.

#### Be consistent everywhere

Use the same messaging and imagery across all digital platforms, so your social media and web site are completely aligned. Consistency is an important way to earn trust (and deliver a clear, unified message).

#### Let clients see who you help and how you can help

Your website should highlight any niche that you work with and what you do specifically for them.

#### Optimize for mobile

As many as 75% of investors could be looking at your site on their phone. Your site should be easy to read and navigate on all devices.

#### Create an offer

Give your prospects a reason to act when on your website. This can be a checklist, a whitepaper, or other educational piece.

#### Look at your metrics

Use tools, such as Google Analytics, to track where visitors are going on your site and track the efficacy of any initiatives. Adjust content accordingly.

### Tools to help build your website

#### Google Analytics

Use this to [help](#) track the metrics of your website. You can look at traffic, sources, and behaviors on your site all in one platform.

#### Unique Positioning Statement Workbook

Symmetry's [Unique Positioning Workbook](#) will have you complete four exercises that relate to all the services you provide your clients, meaningful experiences you have had with clients, some of the characteristics of your book of business, and your ideal client—all to help create your value proposition.



## 2. SEO

Now that you have a great website that highlights what your value is and what services you offer, you'll want to be sure it is optimized to attract the right kind of traffic – the **right potential clients**. 43% of investors under 45 and 27% between ages 45 and 65 found their financial advisor primarily through a web search.<sup>1</sup>

SEO, or Search Engine Optimization, is used to be sure that your website is ranked better when someone uses a search engine. SEO maximizes how often your website shows up in search engine results pages and increases the traffic to your website. There are a few, basic best practices you can use to make sure that you make the most of your website and get the right people to visit.

### SEO Best Practices

#### Optimize for search

Be sure you accurately describe who you are and what you do. Clients looking for a "financial advisor" will have a hard time finding you if you only describe yourself as a "wealth manager." These keywords are words and phrases that your prospects are using to search online. Be sure that you place these relevant keywords across your site. Target keywords are most effective when they are placed at the beginning of a title or header.

#### Use ALT tags on your images.

This is text that is assigned to an image. It should be a brief description or comment about the image.

#### Have other sites link back to a page on your website.

It can be from a blog post, a third party page such as [www.plannersearch.org](http://www.plannersearch.org), your social media profiles, and social media postings. Also make sure you have links from your site to a handful of useful resources, such as [IRS.gov](http://IRS.gov).

#### Be sure your site is optimized for local area searches.

Tools like [Google My Business](http://Google My Business) can help you show up nearer the top in local searches. Be sure to include pictures as well as text.

#### Post new, relevant content each week and optimize your keywords in this content.

This will help improve your rankings for SEO. You can post less frequently, but it will take longer to improve your ranking.

### SEO Resources

#### Google My Business

Having an optimized [Google My Business](http://Google My Business) listing boosts your chances of showing up in a Google Search and can subsequently increase your local search traffic.

#### Ubersuggest

This [site](#) will give you keyword suggestions along with search volume and can also offer competitor analysis.

<sup>1</sup> Oeschli.com study of Investors with a minimum of \$500K, 2019

### 3. Social Media

Social media platforms can be a great way to get in front of your ideal prospective clients and enhance your relationships with your current clients. With a proper social media marketing strategy, Advisors can increase brand recognition, establish themselves as a subject matter expert on specific topics important to investors, and connect with clients and prospects. Social media also helps investors, especially younger investors, validate you.

Providing insightful and informative content on your social media platforms will help accomplish all of these goals.

#### Social Media Best Practices

##### **Be consistent everywhere**

Make sure that your company social media pages have a similar look and feel—and messaging—as your website and other digital properties. Consistency is one of the major foundations of building trust.

##### **Be active**

Advisors who regularly network, prospect, and communicate on social platforms are seeing measurable results. In 2018, Advisors using social media saw average AUM gain of \$15.3 million vs. \$4.3 million for all Advisors.<sup>2</sup>

##### **Dedicate time & resources**

47% of advisors plan to add team members w/ dedicated social media responsibilities. 80% of high achievers pay for premium level of service on a social network.<sup>3</sup>

##### **Get trained**

Advisors who engage in online or in-person training see greater gains than those who rely on hands-on learning or on family, friends, and colleagues.

##### **Have a social messaging strategy and goals to focus your messaging.**



<sup>2</sup> Putnam Social Advisor Survey, 2019

<sup>3</sup> Ibid

## Facebook

Be sure that your Facebook Page clearly articulates what you do and offer. And make sure your *personal* Facebook page reflects well on you.

- **1/3 of Investors** looked at Advisor's personal Facebook page, and of those, 50% decided *not* to work with the Advisor as a result.
- **2/3 of investors under 40** looked at Advisor's personal Facebook pages, and of those, 66% decided ***NOT*** to work with the Advisor as a result.<sup>4</sup>

### Use targeted Facebook ads

Use intriguing headlines or a provocative question leading to a useful offer (checklist, whitepaper, etc.) to get in front of prospects. Facebook's "Looks alike Audience" feature can allow you to focus on prospects who resemble your best clients.



## LinkedIn

### Get your profile right

Be sure you have a strong summary (written in the first person) and a job title that includes "Wealth Manager," "Financial Advisor," or "Financial Planner."



### Focus on your niche

Look through LinkedIn for companies or sectors where your connections are clustered. Look also to see who your connections know. This can help you identify or expand a particular niche.

### Get to gatekeepers

If you work with small and mid-size businesses, sometimes finding the right gatekeeper is key. For example, people in HR can be valuable contacts if you focus on Retirement Plans.

### Use the news

Are there changes occurring in your community that could have implications for your business? Are companies being acquired, downsizing or expanding? LinkedIn can help you help people who have been affected.

<sup>4</sup> Advisor Value Propositions: How Advisors Showcase Their Value to Investors—and What Investors Secretly Think, BNY Mellon Pershing, 2018

## 4. Digital Ads/Offers

Once you have set up your website, the next challenge is getting people to visit. The goal of any digital ad campaign should be to drive prospects to your website and transform new leads into clients. Digital banners/offers can also be used on your website to drive deeper engagement.

### Digital Ads Best Practices

#### Be sure to have a compelling offer

You want to give the audience a reason to take action. This can be a toolkit, a whitepaper, a webinar, a subscription to your newsletter—something that allows you to earn further consideration and interaction with a prospect.

#### Include eye-catching graphics

Carousel images and videos can enhance your ad and visually display the offer.

#### Be consistent

Ensure that your message and the presentation of your offer – both ad and landing page –are consistent across all aspects of the campaign

#### Target your audience

Don't just market to the masses – hone in on your target audience and get in front of the right prospects.

### Digital Advertising Tools

#### LinkedIn Campaign Manager

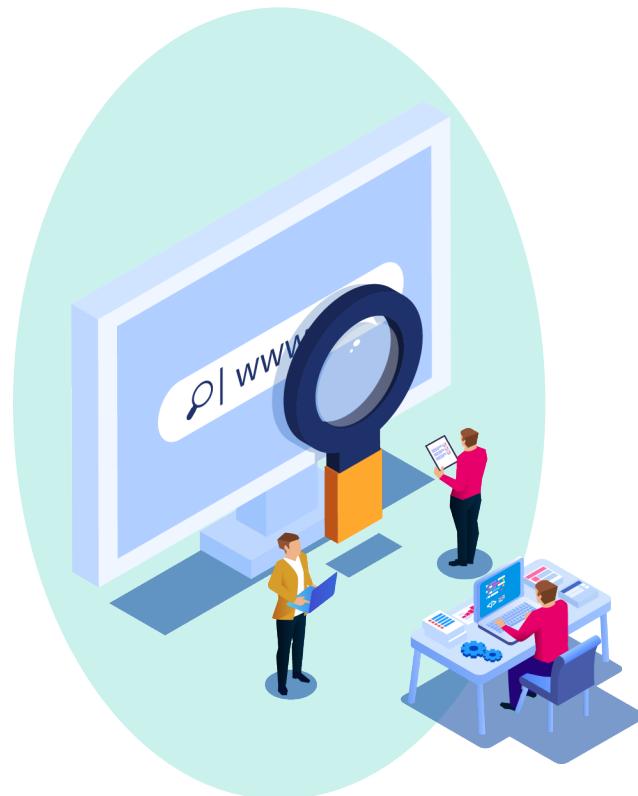
LinkedIn provides a dashboard for paid advertising campaigns through their platform. Using this [tool](#), you can plan your ad, choose your target audience, and set a budget.

#### Facebook Insights

This is Facebook's audience and insight [tool](#) – it allows you to build an ad, target the audience in several different ways, and provides analytics on how your ad did once complete.

#### Google Ads

Google has a pay-per-click [online advertising platform](#) that allows you to display ads on search results pages based on key words. You can pay to get your ad ranked at the top of the search results page.



If you have questions about anything in this Guide or would like to learn more about Symmetry Partners, please contact your [Symmetry Regional Team](#).

### About Symmetry Partners

Founded in 1994 by financial advisors for financial advisors, Symmetry offers a complete business solution with best-of-breed, Evidence-Based investment strategies, including *PrecisionCore ETF Models* and *Panoramic Mutual Funds & Models*. To help Advisors deliver a better client experience, we also provide marketing, technology and operational consulting and support.

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