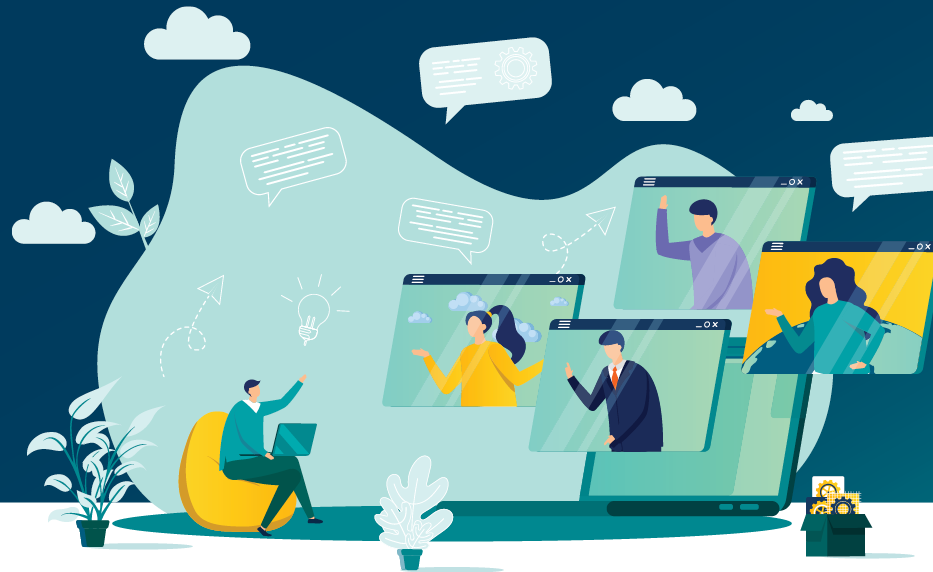


SYMMETRY®

# ADVISORFEST

EXPERIENCE • GROWTH • TRANSFORMATION

## Mastering Digital Marketing



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Presented by:

**Andrea Loin**


Digital Marketing Specialist

**J. William G. Chettle**

Director of Experience & Engagement

# Agenda

- What is Digital Marketing
- Who is your audience?
- What's driving your campaign?
- Steps to Running a Successful Campaign



The graphic features a dark blue background with a large, stylized white number '100' and a question mark. To the right of the '100?' is a circular illustration of a birthday cake with candles and presents. Above the '100?' is the text 'What if I live to'.

### Retirement Readiness Assessment

With life expectancy rates increasing, an abundance of information at everyone's fingertips and more options than ever before, it can be difficult to know where to start when it comes to planning your future in retirement. While the possibilities may seem endless, adding a little structure and organization to the thought process can provide you with clarity and direction. This self-assessment can help you gauge where you are doing well and where you may need additional help and advice.

---

#### General

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☐ Yes   ☐ No
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☐ Yes   ☐ No
3. I have identified the top 3 priorities I'd like to focus on in retirement.  
☐ Yes   ☐ No
4. I have a wellness plan that incorporates physical activity and nutrition into my life.  
☐ Yes   ☐ No
5. I am ready for this next chapter of my life.  
☐ Yes   ☐ No

# What is Digital Marketing?

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# Digital Marketing

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- Digital Marketing encompasses all marketing efforts through digital channels, such as **websites**, **social media**, **email**, and **search engines** used to connect with prospects and current clients



# How Advisors Are Marketing Today








Almost **half** of marketing now has digital component

Source: How Financial Planners Actually Market Their Services, Kitces Report, Vol. 2 2019

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Marketing Strategy	% of Advisors Using
Client Referrals	93%
COIs	60%
Networking	47%
Social Media	42%
Client Appreciation	36%
Website	31%
Blogging	30%
Education Events	29%
Seminars	26%
Firm Brochure	26%
Drip Marketing	24%
SEO	22%
Videos	12%
Paid Websites	11%
Online Ads	10%
Marketing Consultant	10%
Direct Mail	9%
Paid Advertising	8%
Webinars	8%
Book	7%
Solicitors	7%
Podcasts	7%
Radio	5%
Custodial Referrals	5%
Marketing Lists	3%

# Advisors' Top Strategic Initiatives

- |  |   |
|--|---|
|   | Acquire new clients through client referrals        |
|   | Acquire new clients through business referrals      |
|   | Improve productivity with new technology            |
|   | Enhance strategic planning and execution            |
|   | Recruit staff to increase firm's skill set/capacity |
|   | Improve satisfaction for existing clients           |
|  | Improve productivity using process changes          |
| 8  | Bring on principal with existing book of business   |
| 9  | Develop or enhance a succession plan                |

# Putting Your Brand to Work

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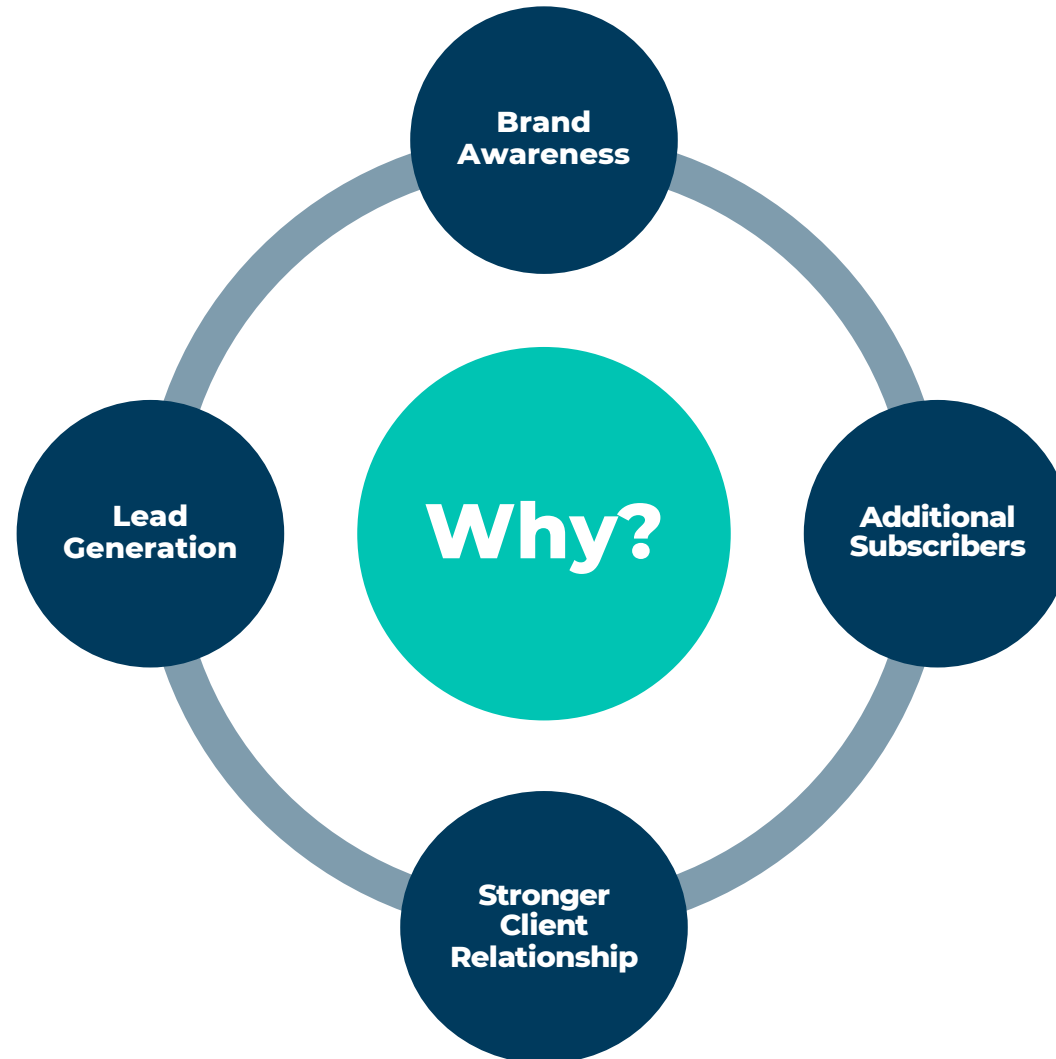
How do you run a successful digital marketing campaign?



# Start With WHY

---

Why do you want to run the digital marketing campaign?



# SMART Goals

---

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**S**

## **SPECIFIC**

Your goal is direct, detailed, and meaningful.

**M**

## **MEASURABLE**

Your goal is quantifiable to track progress or success.

**A**

## **ATTAINABLE**

Your goal is quantifiable to track progress or success

**R**

## **RELEVANT**

Your goal aligns with your company mission.

**T**

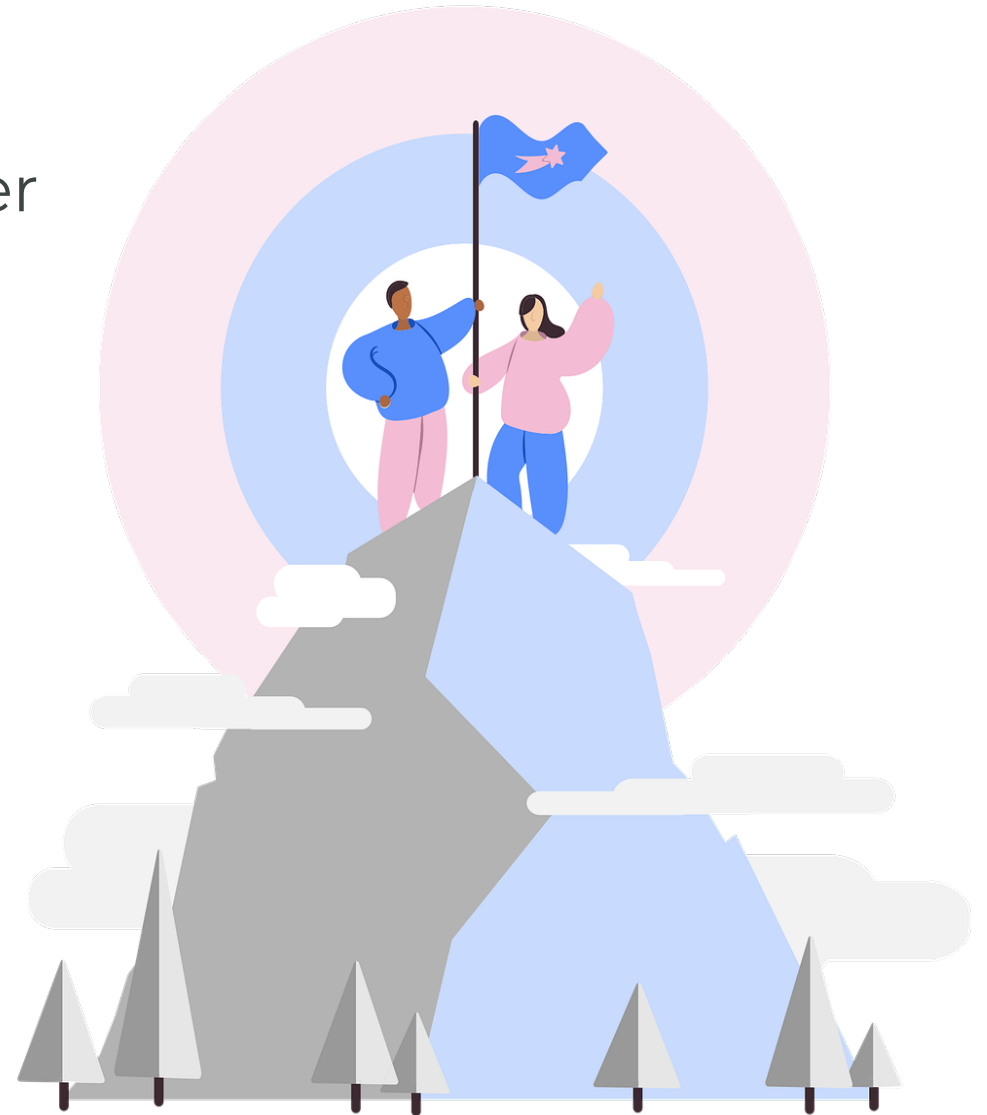
## **TIME-BASED**

Your goal has a deadline.

# Setting Goals

---

- Don't just say you want to generate "more" leads. Quantify it with a number that is both **attainable** and **trackable**.
- A working goal could be:  
Generate 50 leads from the campaign and gain 2 new clients in 8 weeks.



# The WHO

Who is your ideal client for the campaign?

	<b>Job Responsibilities</b> <ul style="list-style-type: none"><li>Consult with employers to identify needs and preferred qualifications</li><li>Interview applicants about their experience, education and skills</li><li>Contact references and perform background checks</li><li>Inform applicants about job details such as benefits and conditions</li><li>Hire or refer qualified candidates</li><li>Conduct new employee orientations</li><li>Process paperwork</li></ul>	<b>Reports to</b> <p>Head of HR</p>	<b>Preferred Method of Communication</b> <p>Email Social Media (Twitter, FB, LinkedIn)</p>
<b>Name</b> <p>Sample Sally</p>		<b>Their Job Is Measured By</b> <p>Talent Acquisition Talent Development Performance Management</p>	
<b>Age</b> <p>35 to 44 years</p>			
<b>Highest Level of Education</b> <p>BA in Communications</p>			
<b>Social Networks</b> 			
<b>Industry</b> <p>HR</p>			
<b>Organization Size</b> <p>1001-5000 employees</p>	<b>Goals or Objectives</b> <p>Increase the percentage of active open positions filled within the targeted deadline.</p> <p>Maintain the employee retention rate (less company-initiated transitions) above 75%.</p>	<b>Biggest Challenges</b> <p>Compliance Management changes Workforce training and development Adapating to innovation</p>	
	<b>They Gain Information By</b> <p>Reading blog posts Receiving industry email newsletters Social media</p>	<b>Tools They Need to Do Their Job</b> <p>BambooHR Greenhouse Slack Trello</p>	

# The WHAT

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What marketing will you need for the campaign?



# The Live to 100 Campaign

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# Campaign Elements

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What if I live to

100?

### Retirement Readiness Assessment

With life expectancy rates increasing, an abundance of information at everyone's fingertips and more options than ever before, it can be difficult to know where to start when it comes to planning your future in retirement. While the possibilities may seem endless, adding a little structure and organization to the thought process can provide you with clarity and direction. This self-assessment can help you gauge where you are doing well and where you may need additional help and advice.

#### General

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☐ Yes ☐ No
- I have a wellness plan that incorporates physical activity and nutrition into my life.  
☐ Yes ☐ No
- I am ready for this next chapter of my life.  
☐ Yes ☐ No

YOUR  
LOGO  
HERE

HOME

What if I live to

100?

**The good news:** We are living longer, healthier lives. A typical 65-year-old baby boomer couple could spend as much as 25 – 30 years in retirement. And as medical advances continue, reaching 100 or more will become increasingly common.

**The bad news:** Too many people don't have a retirement plan that can keep them comfortable for 30+ years. For many, there is a real risk of outliving their money. Our **Retirement Readiness Assessment** can help you think through the key issues and challenges you will need to plan for.

What if I live to

100?

### Retirement Readiness Assessment

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What if I live to

100?

LEARN MORE

Are you retirement ready?

A typical 65-year-old baby boomer couple could spend as much as 25 – 30 years in retirement. And as medical advances continue, reaching 100 or more will become increasingly common.

Our 20-question **Retirement Readiness Assessment** can help you understand the key opportunities and challenges.

DOWNLOAD OUR RETIREMENT READINESS ASSESSMENT

WHAT IF I LIVE TO 100?

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DOWNLOAD OUR RETIREMENT READINESS ASSESSMENT

# 1. What is the Campaign/Resource?

## Live to 100 Checklist

What if I live to

# 100?



### Retirement Readiness Assessment

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☐ Yes   ☐ No



## 2. Create Your Landing Page


What marketing will you need for the campaign?

{YOUR LOGO HERE}

HOME

What if I live to

**100?**




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What if I live to

**100?**



**Retirement Readiness Assessment**

With the increasing life expectancy, an assessment of retirement at retirement is longer and more complex than ever before. It can be difficult to know when to start when it comes to planning your future retirement. With the assistance of our team, we can help you with the plan and organization to the financial plan that you will need to plan for. This self-assessment is designed to help you gauge where you are today and where you need to go to reach your goals.

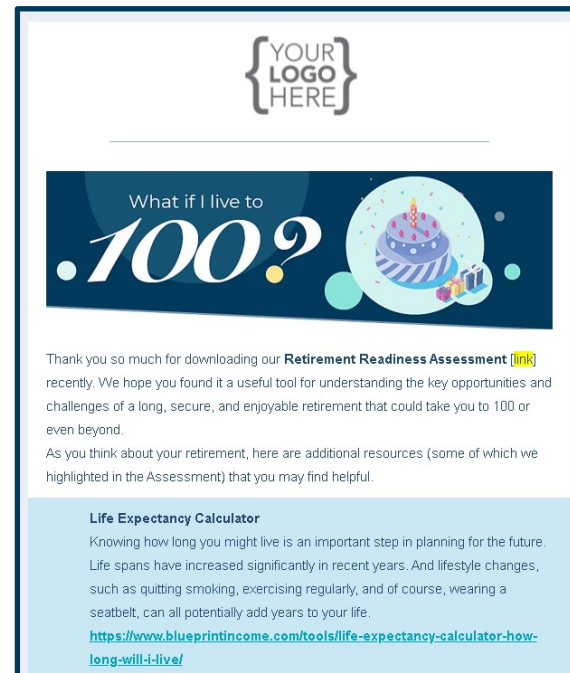
**Goals:**

1. I know and have discussed what I need to do to retire and what that looks like for me.  
Yes No
2. I understand the key retirement planning issues and how they impact my retirement.  
Yes No
3. I understand how the top 5 retirement issues impact my retirement.  
Yes No
4. I have a retirement plan that incorporates my retirement goals and needs.  
Yes No
5. I am using the best retirement plan for my life.  
Yes No

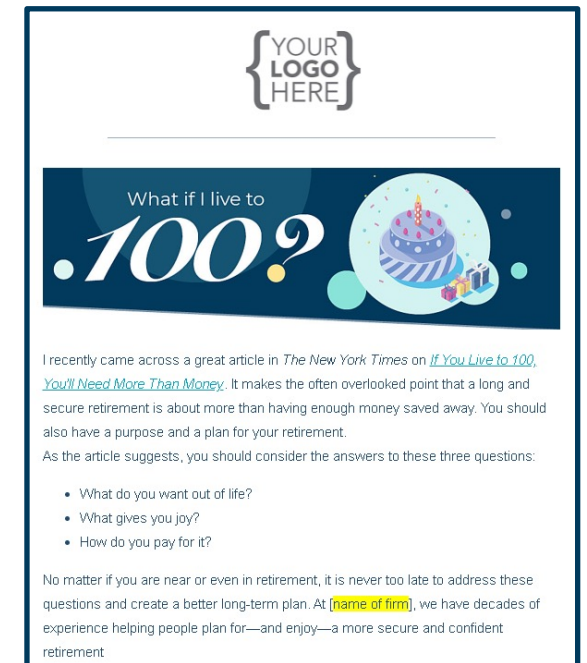
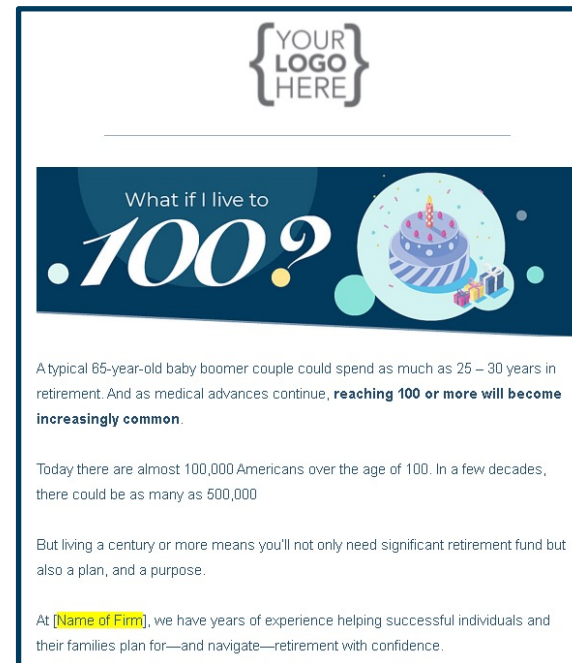
# 3. Email Workflow

## Live to 100 Campaign

Email 1 goes to all prospects and clients



Emails 2 and 3 are drip emails that will be triggered by the download of the checklist



# Email Marketing

Email marketing is not DEAD!



Source: Radicati Group 2020



Source: OptinMaster

## 4. Post to Social Media

How to implement with a campaign



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**WHAT IF I LIVE TO 100?**

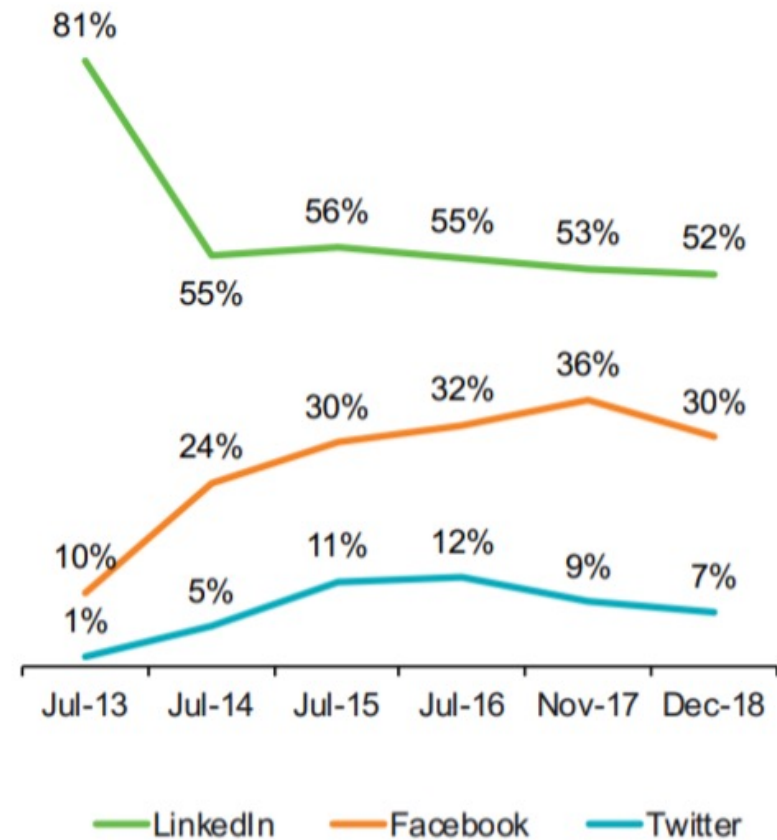
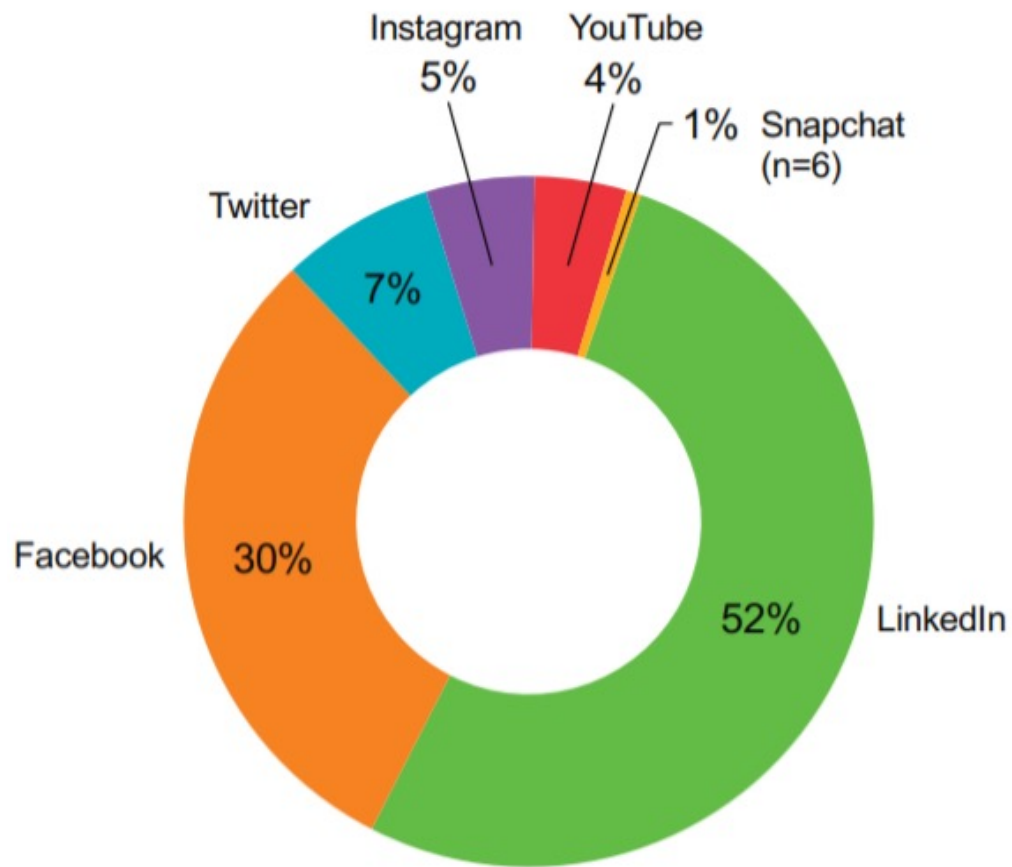
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**DOWNLOAD OUR RETIREMENT READINESS ASSESSMENT**

# What Networks?

## Primary Social Media Network for Business



Source: Putnam Social Advisor Survey, 2019

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## 5. Additional Ways to Promote

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BLOG



PPC ADs



PODCAST



POP-UP AD



SEMINAR

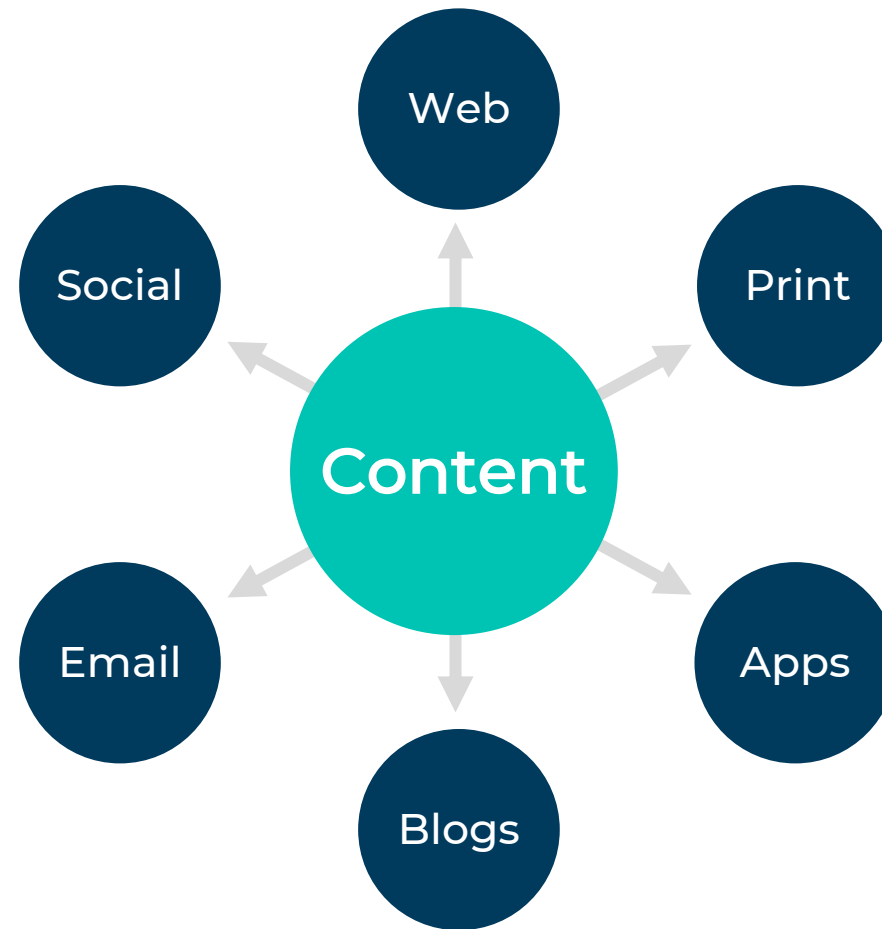


RADIO

# COPE (Create Once, Publish Everywhere)

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# For Example...

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What if I live to **.100?**

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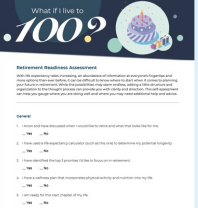
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\_\_\_ Yes \_\_\_ No
5. I am ready for this next chapter of my life.  
\_\_\_ Yes \_\_\_ No

PETERKIN FINANCIAL

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# Measuring Success

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How do you tell the effectiveness of your campaign?

# Analyzing Data

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# The Tools

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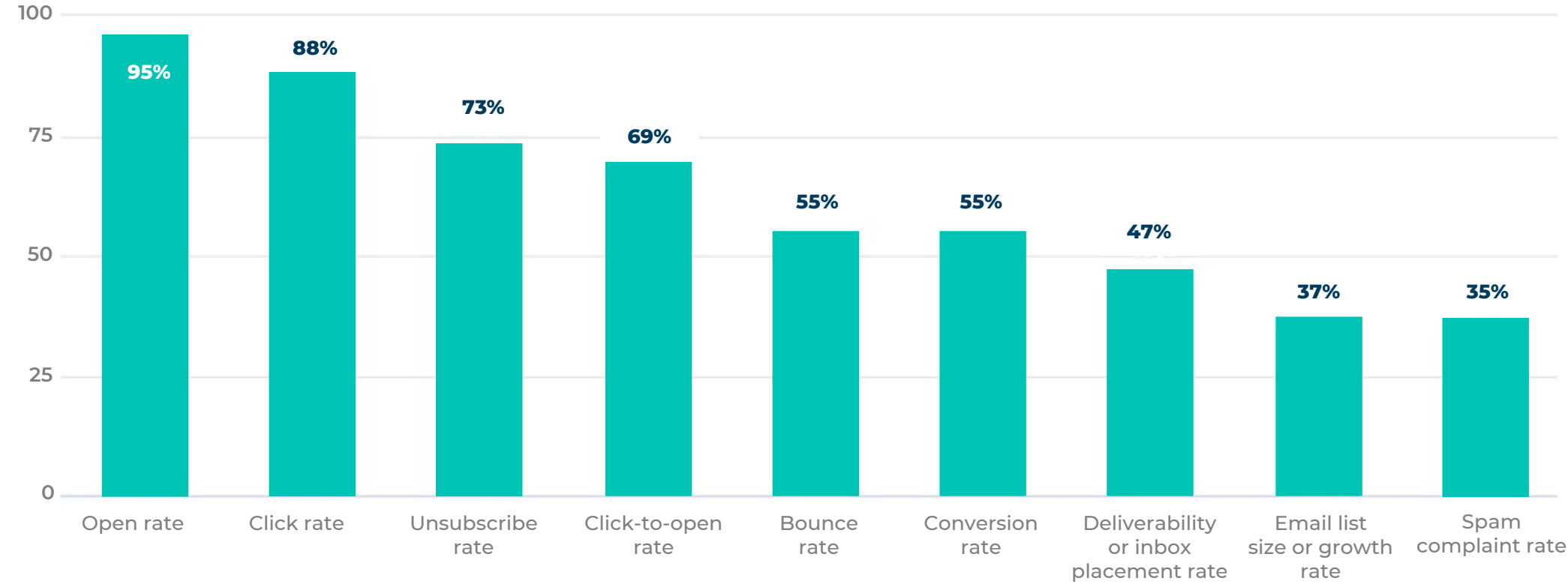
Measuring the Success of Your Campaign



# The Metrics

## Email Metrics

Top Email Marketing Metrics Used by Marketers in 2020



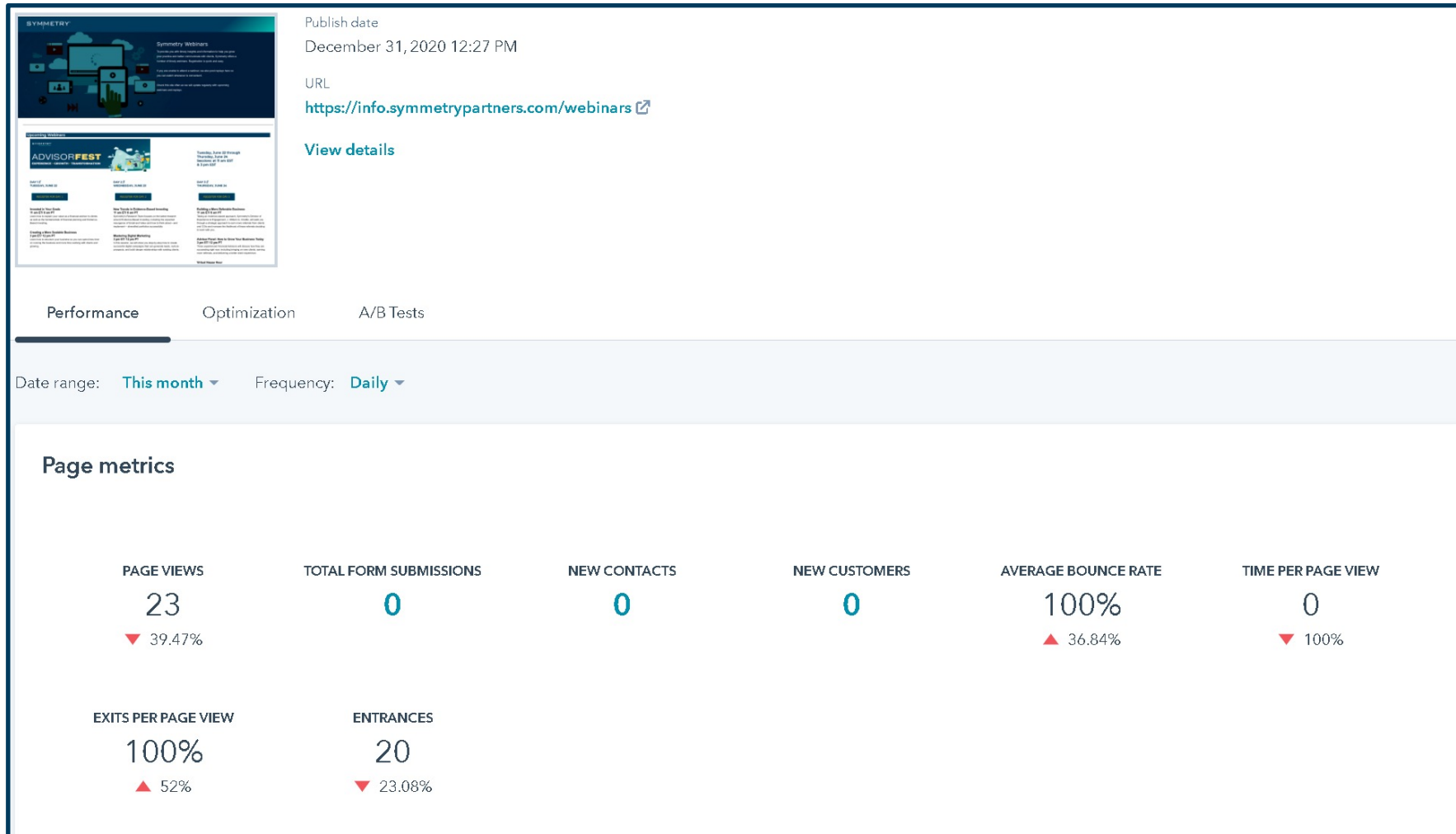
Source: Litmus.com

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# The Metrics

SYMMETRY®

## Landing Page Metrics



# The Metrics

## Social Media Metrics

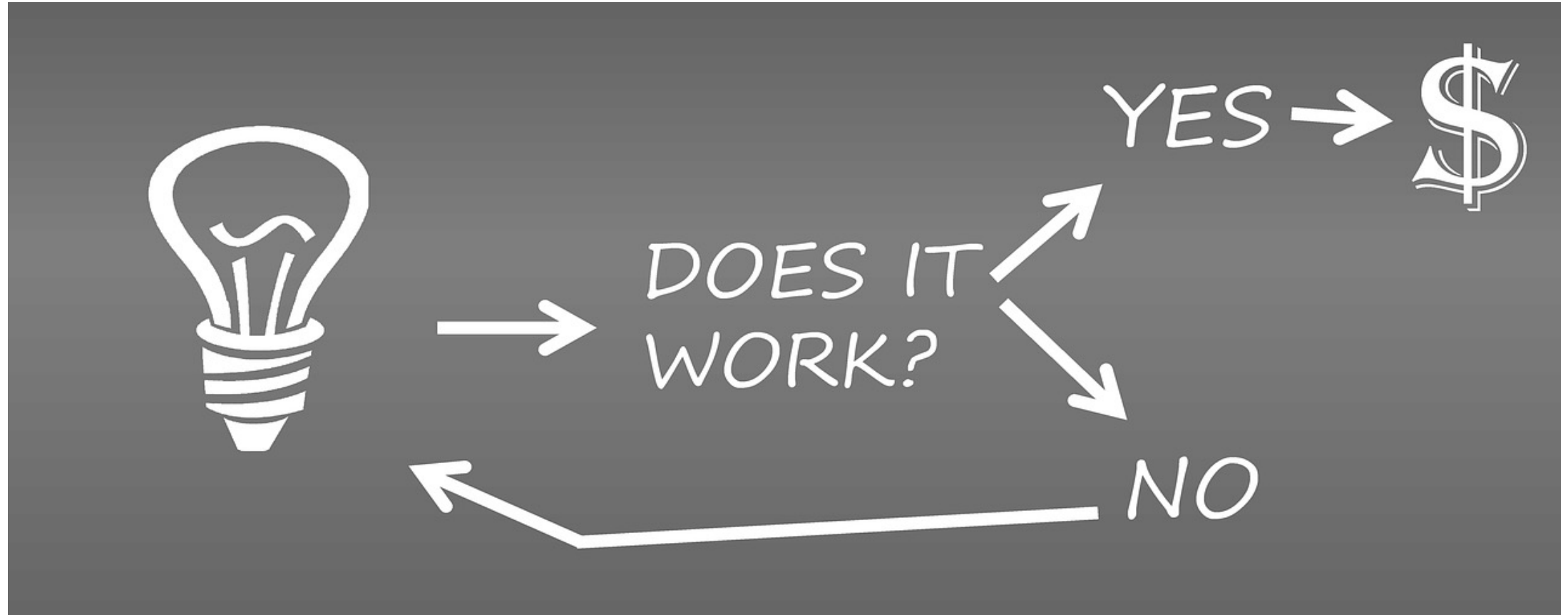
1. Reach
2. Engagement
3. Shares
4. Clicks



# Metrics are Great, BUT....

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What you do with the results is more important!



# If You're Not Running Digital Campaigns...

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# Your Brand Could Be Working....

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SYM|METRY®



# Let's Recap

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A **successful** digital marketing campaign relies on **4** things:

1. Goals and objectives
2. Ideal client persona
3. A useful resource or event
4. Analyzing the results

For everyone that attended today's webinar, we will provide you with the **Live to 100** campaign materials to run the campaign at your firm.

But wait.....

For the first 10 Advisors that reply back, we will run this campaign **FOR YOU!**

# Thank You

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## Disclosure

Please be advised that this reference guide is for educational and background use only. All data is from sources believed to be reliable but cannot be guaranteed or warranted. Please note that nothing in this reference guide is intended to be Compliance or Legal advice regarding your use of Social Media or any Marketing Program. As such, any questions regarding the use of Social Media and Digital Marketing should be directed to your Compliance Department or Outside Counsel.