



8 **DIGITAL**
MARKETING
TIPS TO DRIVE
BUSINESS IN 2021

8 DIGITAL MARKETING TIPS TO DRIVE BUSINESS IN 2021

The landscape of the financial advisor industry is undergoing some changes. As the Baby Boomer generation ages, a new wave of clients is nearing retirement and will need the services of a trusted financial advisor. The only problem is, the same client acquisition tactics that worked with past generations are becoming obsolete. Not to mention, client retention is proving challenging amid generational shifts, with research showing that 66 percent¹ of clients' children will fire their parents' financial advisor when the parents pass away and the children inherit the assets.

Thanks to the ease of access to information through the Internet, it's never been more essential for advisors to establish an active presence online in order to bring in new clients. Digital marketing can be a useful online strategy to connect with potential investors who might be interested in your services, as well as maintain relationships with your existing client base. Below, we described eight digital marketing tactics that should be part of your marketing plan for 2021.

These recommendations are brought to you by the team at Clarity Insurance Marketing; where our mission is to provide advisors access to best-interest annuity screening processes and products. At Clarity, we follow a client-first philosophy where we put YOUR clients first; and leverage our award-winning process and back-office support to make doing business simpler for you. By having your IMO as a trusted partner, we can grow together.

1 OPTIMIZE YOUR WEBSITE FOR SEARCH

When looking for a financial advisor, today's investors turn to the Internet to research firms before scheduling a consultation or moving forward with services. In order to drive traffic to your site, financial advisors need a website that comes up in the search results when certain keywords like "financial advisor firms" and "financial advisor near me" are searched.

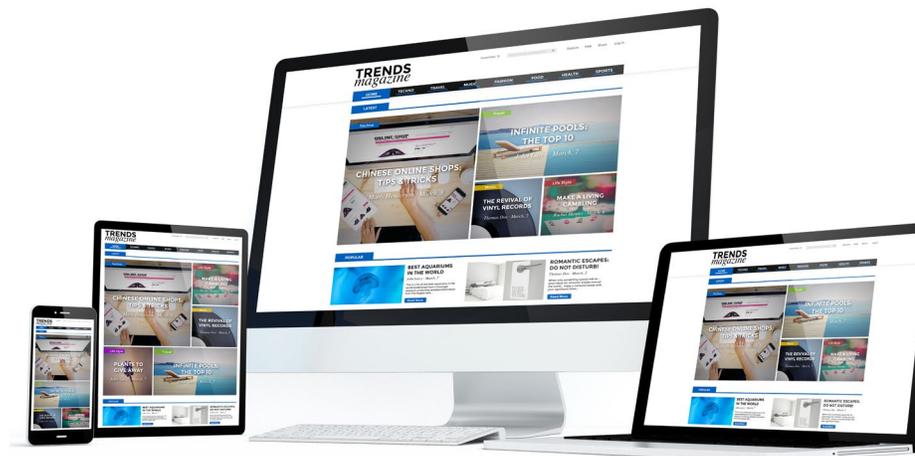
As you begin to optimize your site for search, be sure to place relevant

keywords and phrases throughout your site in the URLs, page titles, headers, and copy. Including industry affiliations and awards can further improve your site's authority, trust, and expertise and boost your rankings in the search engine results pages (SERPs).

2 DESIGN A HOMEPAGE THAT GENERATES LEADS

Your website often serves as an investor's first impression of your firm. While generating traffic can often be the first step to acquiring new business, it's equally important that once visitors reach your website, they convert into qualified leads. According to HubSpot, 55 percent of readers spend less than 15 seconds on a site, so you'll want to ensure that your website makes a quick impact from the moment they land on your homepage.

Headlines and content that addresses the challenges investors are facing, as well as visual elements like videos and infographics can help keep visitors engaged on your site longer as they learn about your firm and the services you offer.



1. www.investmentnews.com/the-great-wealth-transfer-is-coming-putting-advisers-at-risk-63303

SEO | SEARCH ENGINE OPTIMIZATION



Including clear and concise call to actions (CTAs), such as requesting a consultation or downloading a whitepaper, will then be essential for turning those individuals into promising leads.

3 APPLY LOCAL SEO STRATEGIES

Because many financial advisors rely on local markets for business, it's important to leverage listing and review platforms, such as Yelp, Angie's List, and Google My Business to increase exposure in your region. For example, you can optimize your Google My Business listing to include important information, such as:

- Phone number and other contact information
- Business hours
- Website URL
- Office address
- Exterior and interior photos of your office
- Upcoming events
- Special offers

4 CREATE NEW, FRESH CONTENT

Content creation should be a key component of any digital

marketing strategy. When creating a content strategy, think about how you solve financial problems for clients and provide insight into the ever-changing market trends. You want to speak to the pain points they are facing now or in the future. Use that information and proprietary knowledge to then create compelling blog posts, whitepapers, guides, and even webinars that you publish on your site. By creating a consistent stream of new, fresh content, you can:

- Boost search engine rankings to drive website traffic
- Improve credibility and position yourself as a thought leader
- Educate potential clients about the benefits of your services

5 BUILD YOUR FOLLOWING ON SOCIAL MEDIA

Social media platforms, such as LinkedIn, Facebook, and Twitter, can serve as great outlets for reaching and engaging with investors. HubSpot reports that three-quarters of affluent investors regularly use some form of social media, with about 70 percent of investors having

reallocated investments, or began or altered relationships with financial firms based on social media content. When developing your social media strategy, consider:

- Sharing a combination of original and third-party content to establish yourself as a subject matter expert
- Connecting with social influencers and using relevant hashtags to expand your reach
- Promoting your events and services to drive traffic to the website

Remember, your social media strategy shouldn't be a one-sided conversation. In addition to sharing content, be sure to engage with your audiences by responding in a timely manner to followers who comment and engage with your posts.

6 PROMOTE YOUR SERVICES WITH DIGITAL ADVERTISING

While building your website and social media presence organically can take time, digital advertising can have more immediate effects in driving traffic and lead generation for financial advisors.

Pay-per-click (PPC) digital advertising allows you to bid on commonly searched keywords and/or target the demographics and interests of your ideal customer through platforms, such as Google Ads, Microsoft Ads, Facebook Ads, LinkedIn Ads, and more. To control costs, narrow in on your targeting options as much as possible, especially on geographic and behavior options. Financial advisors can use these platforms to build brand awareness, promote services, and acquire leads through form submissions and downloadable content.



7 ENGAGE YOUR AUDIENCE OVER EMAIL

From lead generation and nurture campaigns to newsletters and promotional offers, email can serve as a powerful digital marketing tool for financial advisors. Regularly scheduled drip campaigns and newsletters can help keep your name in front of leads and prospects, while educating your readers about your services. You can even use email to obtain referrals from your current client base and ask for reviews. As your business grows, consider using marketing automation to help scale and streamline your email marketing efforts.

8 EDUCATE PROSPECTS WITH VIRTUAL SEMINARS

While we may start to see more financial advisors going back to in-person workshops and meetings next year, virtual seminars will not be going away completely. As we've covered above, prospects are spending more time online educating themselves and doing due diligence on an advisor that they can trust. By incorporating virtual seminars into your digital marketing strategy you'll be able to provide valuable content while displaying your personality, which can help build rapport. So by creating a low-cost, virtual version of your workshops, that prospects can view 24/7 on-demand, you'll be on your way to driving new leads into the top of the funnel while you sleep.

ARE YOU READY TO GROW?

Digital marketing can be a very efficient, cost-effective strategy for financial advisors to help drive your growth. When coupled with an award-winning insurance marketing organization that helps put your clients' needs first, you have a winning combination that delivers results. Just as these marketing strategies are in the best interest of your overall marketing plan, Clarity is dedicated to the implementation of best interest practices for the use of its insurance products. Schedule a call today to discover how other elite advisors are transforming their business by partnering with Clarity Insurance Marketing. It's in YOUR best interest! ■

**READY TO PUT TOGETHER A WINNING GAME PLAN TO DRIVE MORE BUSINESS?
CLICK HERE TO SCHEDULE A FREE CONSULTATION CALL WITH ONE OF OUR
BUSINESS DEVELOPMENT REPRESENTATIVES TODAY!**

ABOUT CLARITY INSURANCE MARKETING



Clarity Insurance Marketing (Clarity) is a best interest-focused insurance marketing organization (IMO) that facilitates advanced product screening, selection and support for all lines of fixed insurance products, such as fixed and indexed annuities, single premium and traditional life insurance and asset based long-term care products. It works to create efficient back-office support and quality service standards to help advisors issue new business quickly, accurately and effectively. Clarity is dedicated to the implementation of best interest practices for the use of its insurance products—effectively mitigating risk for institutions, their advisors, and ultimately American families nationwide through sophisticated case design, product selection and implementation of insurance solutions as financial planning tools. For more information, visit www.ClarityInsuranceMarketing.com or call (844) 381-4115.