

PLANNING

DIGITAL
MARKETING

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ANALYSIS

10 DIGITAL
MARKETING
TIPS TO DRIVE
BUSINESS IN **2023**

10 DIGITAL MARKETING TIPS TO DRIVE BUSINESS IN 2022

Many of the tactics you have used for years are becoming obsolete as generation X and elder millennials begin their search for a trusted financial advisor. As baby boomers age, a new generation of clients is nearing retirement. You want to target those prospects and earn their long-term business, which means adapting to the digital world. The landscape is changing; you can no longer rely on customer retention to feed your funnel. Research shows that, on average, 66% of your current clients' children will fire you once their parents pass away and they inherit your clients' assets. No advisor wants this; losing an existing customer is worse than missing out on a new sale.

Thanks to the ease of access to information through the Internet, it has never been more essential for advisors to establish an active presence online 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 and maintain relationships with your existing client base.

Below, you will find 10 digital marketing tactics that should be part of your marketing plan for 2023. These recommendations are brought to you by the team at C2P Enterprises, where our mission is to provide advisors access to best-interest annuity screening processes and products. At C2P, 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.

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. 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. According to HubSpot, 55% of readers spend less than 15 seconds on a site, so you will want to ensure that your website makes a quick impact from the moment they land on your homepage. While generating traffic can often be the first step to acquiring new business, it is equally important that once visitors reach your website, they convert into qualified leads. Headlines and content that addresses the challenges investors are facing, as well as visual elements like videos and infographics,



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can help keep visitors on your site longer as they learn about your firm and your services. Including clear and concise calls to action (CTAs), such as requesting a consultation or downloading a whitepaper, will 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 is crucial that you take advantage of listing and review platforms, such as Yelp, Angi, and Google My Business, to increase exposure in your region. For example, you can optimize your Google My Business account to include important information, such as:

- Phone Number
- Additional Contact Info
- Business Hours
- Website URL
- Office Address
- Office Photos – Interior & Exterior
- Upcoming Events
- Special Offers

4 AUTOMATE YOUR SCHEDULING

You want to make scheduling time with you easy, right? Cut out valuable time in your sales cycle using an automated scheduling service like Calendly. It lets prospects

select a time convenient for them and automates appointment reminders (via email and text messages) to help cut down on no-shows. **Bonus tip:** Create tracking links for each campaign you run to measure and analyze your results.

5 CREATE NEW CONTENT REGULARLY

Content creation should be a vital 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 create compelling blog posts, whitepapers, guides, and even webinars to publish on your site. By creating a consistent stream of new, fresh content, you can:

- Boost your SEO rankings
- Increase traffic to your website
- Improve your site's credibility and authority
- Position yourself as a thought leader
- Educate prospects about your business
- Move customers through the sales process

6 USE SOCIAL TO BUILD YOUR BRAND

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% having reallocated investments or begun or altering relationships with financial firms based on social media content. When developing your social media strategy, consider the following:

- Sharing a combination of original and third-party content to establish yourself as a subject matter expert (SME)
- Connecting with 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 should not 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.



7 PROMOTE YOUR SERVICES WITH DIGITAL ADVERTISING

While building your organic website and social media presence can take time, paid digital advertising can take effect immediately, driving traffic and lead generation. 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 like Google Ads, Microsoft Ads, Facebook Ads, LinkedIn Ads, and more. Financial advisors can use these platforms to build brand awareness, promote services, and acquire leads through form submissions and downloadable content. To control costs, narrow

8 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.

9 EDUCATE PROSPECTS WITH VIRTUAL SEMINARS

While we may start seeing more financial advisors returning to in-person workshops and meetings next year, virtual seminars will not go away completely. As we covered above, prospects spend more time online educating themselves and doing their due diligence to find an advisor they can trust. By incorporating virtual seminars into your digital marketing strategy, you can 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 will be on your way to driving new leads to the top of the funnel while you sleep.

10 LEVERAGE COMPLIANT CLIENT ENDORSEMENTS

Are you prepared for the new SEC marketing rule? Before these new regulations, advisors couldn't utilize first-hand accounts from satisfied customers. But that's all changed as of November 4, 2022! Do you know all the disclaimers and

disclosures you need to accompany your marketing materials? You still have to maintain marketing compliance with endorsements and testimonials, or you risk incurring substantial fees. You should be even more selective about who you solicit testimonials from than you are about referrals. One of the best ways to ensure you do not break any rules is to involve compliance in the review process of your workflow for any content you publish, especially if it contains endorsements. Do not send a mass email to your entire client database because if you get any negative responses, those are considered client complaints and must be reported. **Bonus tip: Download our eBook: [New SEC Marketing Rule: Financial Advisor Compliance Guide](#)**

ARE YOU READY TO GROW?

Digital marketing can be a very efficient, cost-effective strategy 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 financial advisor marketing strategies are in the best interest of your overall marketing plan, C2P is dedicated to implementing best-interest practices for the use of its insurance products. Schedule a call today to discover how other elite advisors transformed their business by partnering with C2P Enterprises. It is 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 C2P ENTERPRISES

Simplifying financial planning for financial advisors and their clients C2P Enterprises is a holding company comprised for four distinct brands, each designed to simplify financial planning for advisors and the clients they serve. United by the vision to provide planning and financial products and solutions in the best interest of the client, each company offers education, training, resources and tools to meet a client's unique financial situation, along with access to an array of investment and insurance vehicles to help accomplish their goals. Each organization is committed to fiduciary best interest practices and raising industry standards for a higher quality of holistic financial planning services to families nation and worldwide.