

# Digital Marketing Strategies

FOR WEALTH ADVISORS

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# Position yourself as a thought leader.

Your digital marketing strategy should position you as an industry thought leader, enhance your brand, foster client engagement and referrals, and generate significant visitor traffic to your website.

Iconic Group has over a decade of experience working with wealth advisors at many of the largest financial institutions in Canada. Our team understands the needs of wealth advisors, and knows how to reach affluent and emerging Canadian investors online without being disruptive. We're marketing strategists, social media experts and multimedia creators who work hard and love what we do.

This guide is designed to help you with your digital marketing strategy - take this information and implement it by utilizing the skills of your team, or give us a call for a free consultation and quote for our services.

## Inbound Marketing

The most successful digital marketing strategy in the industry is called **inbound marketing**. Inbound Marketing is the process of attracting prospects via content creation before they actively seek out information. It's one of the best and most cost-effective ways to convert strangers into customers and then promoters of your business. It involves all elements of digital marketing and is personalized to reflect each advisor's client base, region and approach to wealth management. An inbound marketing campaign should include:

1. Custom blog posts from a professional copywriter
2. Search Engine Optimization (SEO) techniques
3. Business optimization on Google
4. Daily social media updates (Monday to Friday)
5. Client surveys and feedback
6. Marketing strategy meetings and reviews
7. eNewsletter marketing
8. Pay Per Click (PPC) ads on social media
9. Ongoing social media networking



Iconic Group's inbound marketing program started with our skilled, motivated internal team, who then completed additional digital marketing training by the largest inbound marketing company in the United States. However, if your wealth management team has the right tools and commitment, inbound marketing is something that you can do on your own. Here's some of what you would need to do:

**Write Custom Blog Posts:** Blogging can drastically improve your key web stats while cementing you as an industry and thought leader. Custom written blogs are what Google looks for when ranking websites. Content that is reused and shared across many websites actually has a negative effect on your SEO. Blogging can be difficult for those who struggle to write clearly or want to make each post 100% perfect. However, the most successful blogs are concise, jargon-free, and most importantly, done on a consistent basis!

**Regular Strategy Reviews:** Staying up-to-date with what your clients and prospects are interested in requires regular in-person/phone/email communication or an online survey. You should also keep up to date on what is trending in your region.

**TIP:** Google News and Google Trends are great tools for keeping you “in the know”.

**eNewsletter Marketing:** A newsletter featuring recent blog posts will engage clients and lead them back to your website. It’s also one of the best ways to encourage client referrals - all it takes is one client hitting “forward” on an engaging blog post to attract a new lead.

**Search Engine Optimization (SEO):** SEO is the process of getting traffic from search engines. Google, for example, is looking at specific elements in your website. If you meet their requirements, you’ll rank higher and generate additional organic traffic (via online search VS from direct referral). Here’s what you need to have a high Google ranking:

- **A Responsive Website** - In recent years, Google has given lower ranking to websites that are not responsive (HTML5). Make sure your website adapts to mobile devices such as iPhones and iPads. We can help you with this!
- **Traffic** - Traffic is a key component to generating page rankings. Essentially, Google wants to promote websites that are popular. If you have more traffic than another website that appears following the same keyword search, your website will appear closer to the top of the search results page.
- **Updates** - Google does not like stagnant websites. If you want to increase your page rankings and search position, you must commit to a regular update strategy (i.e. blogging or news updates). A good update consists of text or text and a hyperlink, and reflects your back end keywording (ie ‘retirement planning’). **RSS feeds and automated reports from head office do not constitute a true update in the eyes of Google.**
- **Backed Content** - If you are trying to appear in search results for “Business Succession & Sale Planning Specialist”, you must have a page on your website and/or a blog article with unique content that describes and uses that specific phrase. You should also have links/articles on the website that are relevant to this speciality.

## Social Media, Networking & Promoting Your Website

It is extremely important to have professional, engaging social media profiles (LinkedIn, Facebook, Twitter, etc) that are updated regularly with relevant content. These profiles should be promoted to your existing network, and used as a means to connect with prospective clients.

- If you have social media profiles, ensure that they display a prominent link back to your website. It is also beneficial to link to your various social media profiles from your website in a clear, visually appealing way (an icon on your homepage is ideal).
- The goal of any website should be to get more visitors. If you promote your blog updates on social media via a link to your website, it will help you generate better traffic and increase your Google page ranking.
- Utilize PPC (pay-per-click) ads on Facebook and other social media platforms. These ads are simple, easy to create and deploy, and offer a great ROI.

While we're on the subject, here are some interesting statistics on social media use by wealth advisor clients and prospects (provided by Vestorly):

**81%**  
**are using social  
media for business**  
Up from 75% in 2014

**79%**  
**gained new clients  
via social media**  
Up from 66% reporting  
client gains in 2014

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**\$4.6M** was the average asset gain  
Median = \$1.9M

 **53%** gained  
over \$1M in  
new assets

 **71%** who gained  
assets were active  
on a daily basis

### **Additionally, it was reported that:**

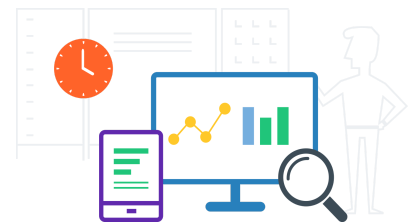
- 44% of mass affluent social media users engage with financial companies online
- 31% read content from financial companies on social media
- 30% follow or like financial companies on social media
- 23% review multimedia content from financial companies on social media

**TIP:** 80% of data shared on social media is considered 'dark data'. Dark data refers to sharing web links or information over text messages or email where the data can not be track by the originating source.

Need a better social profile? Let's chat. Iconic Group can significantly increase your social reach!

## **Final Thoughts & Useful Tips**

A successful digital marketing strategy does not happen by accident. It takes research and planning, skill, enthusiasm and consistency to truly make your mark in the digital realm. If you want to give it a try, we're happy to offer a free consultation and some personalized recommendations (either for your own implementation, or through our highly successful inbound marketing program).



### **In closing, here are a few general tips:**

- It is important to bring all marketing efforts together. Include your website URL on all business cards, PDF files, printed collateral and most importantly your email signature.
- Ask prospects if they've been to your website. You may be surprised to hear that approximately 50% of prospects will have already visited your website.
- If the prospect says no, use it as an opportunity to encourage the prospect to visit your website and learn more about you.
- Introduce existing clients to your website with a launch letter. If you're launching a website through Iconic Group, our team will provide you one.
- Remember: if you do not prompt clients to visit your website when new material is posted, they will not know about the update and will not visit your website.
- Encourage clients to forward interesting articles and updates to colleagues, friends and family members that could benefit from the information. This can lead to more referrals.

Have fun and get to work! Or call us - we'll do the work for you.