

MARKETING MANUAL

FOR ADVISORS IN A DIGITAL AGE



How your client base interacts with and are influenced by the world around them is changing.

For advisors operating in an Online, global economy - where carriers compete with you on a direct to consumer level daily - it's more important than ever to make sure you're investing in marketing efforts and tools that are the most effective.

You need to stand out from the rest of your industry and prove to your prospects why you're their best choice. Your message has to be clear, fun and most importantly everywhere they are.

This Marketing Manual is a resource for advisors like you to better understand all your current marketing opportunities, and how maximize them to grow your business.

Overwhelmed by all the options?

**THAT'S WHERE
WE CAN HELP.**

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UNIQUE SELLING PROPOSITION

We all want to start attracting as many new prospects as possible. And seeing the efforts of a campaign pay off is nearly as rewarding as closing cases.

But before we can start placing ads, promoting social media campaigns, sending emails, making phone calls and setting appointments, we need to make sure we have a plan and all of its pieces are ready for action.

It all begins by asking yourself one question:

What makes you...you?

The first step for some may be the hardest. You need to set aside some time to sit down and think of what you specifically have to offer that makes you different from the major carriers that sell direct-to-consumer.

You also need to think about how working with you is different than working with the competition down the block.

This is your story, your unique identifier, what sets you apart.

People in your area should work with you. But why? If you're not sure, don't worry.

In today's marketplace, what makes working with you unique doesn't have to focus on the products you offer. It can - and in many situations should - be on your own personal traits. Sometimes it's as simple as asking yourself why you chose to be in this business to begin with.



What are you proud of? What do you stand for? What does the audience need to know about you?

This is your personal brand.

And you want to keep it in mind at all times and reflect it through every marketing channel you use. Now, take some time to write down what makes you you!

Awareness vs. Action

Now that we've established who you are, it's time to decide what you want. In other words, what do you want to get out of your marketing efforts? There are two options to choose from:

Awareness: awareness advertising uses a soft sell approach, where you leave it up to the prospect to contact you.



Awareness ads will direct prospects to your website homepage or to an article or blog on your website. From there it will

be up to the prospect to decide if they want to learn more about you.

Action: action advertising takes a much more direct approach. It works best when you offer something of value to your prospect, such as a free quote or consultation, a bit of knowledge or peace of mind in exchange for that prospect's contact information. You'll use that contact information later, either through an email, phone call or direct meeting, to develop a marketing relationship.



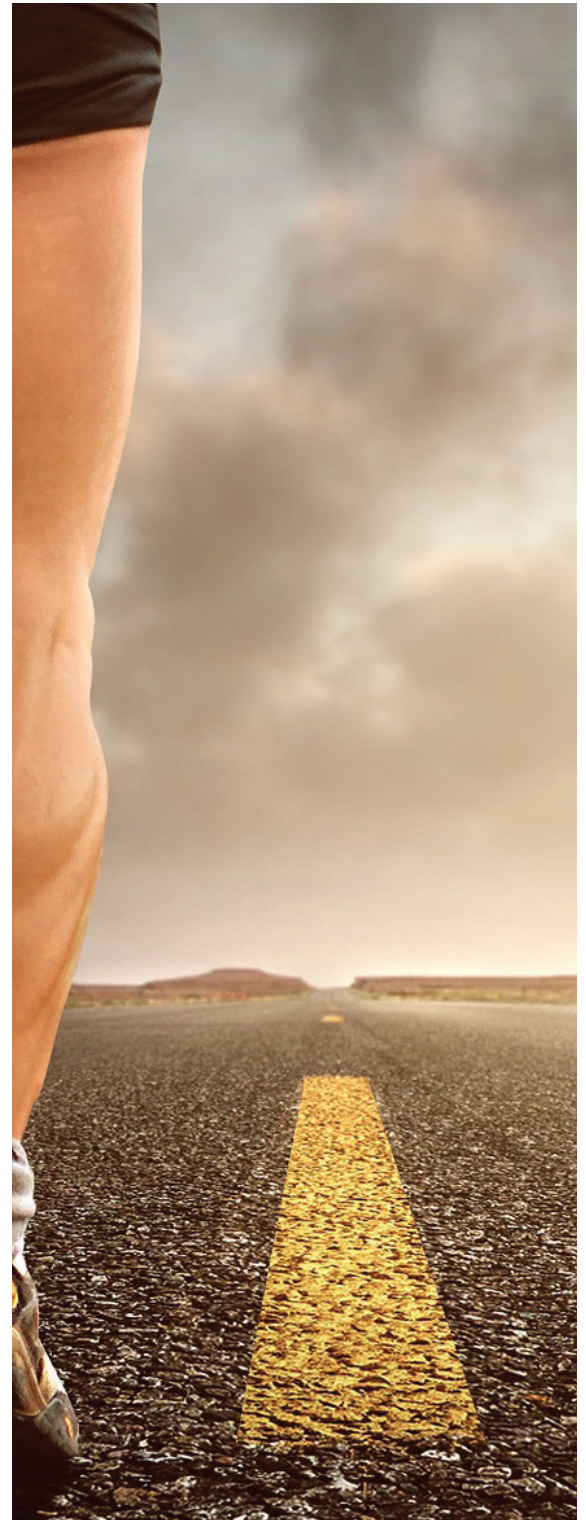
ACTION-BASED STRATEGIES ALLOW PROSPECTS TO OPT-IN TO YOUR OFFER, WHICH HELPS YOU QUANTIFY THE SUCCESS OF YOUR CAMPAIGN.

When you do promotions that involve asking for your prospect to take some course of action, you must keep in mind the law of reciprocity.

For example, as we discussed, you'll want to offer your prospects something of value - a video explaining why you want to help them, details on a product they may want, a paper/guide/report you authored that helps solve a problem or ease a burden for them.

When you make this offer, the most important thing to keep in mind is: what you have to offer must carry a perceived value higher than what you are asking for in return.

This is basic reciprocity. For advisor looking for more prospects, the exchange is essential in the early trust-building process.





If your goal is for a prospect to share his or her contact information with you, then you **MUST** offer in exchange information he or she values more than said contact info.

While action campaigns are more effective at gathering numbers of leads, prospects and - hopefully - clients, they do require a little more work on your part.

WORK THAT IS HIGHLY WORTH THE EFFORT

IN ADDITION TO MATERIAL TO EXCHANGE FOR INFORMATION, YOU'LL ALSO NEED A PLAN. THAT IS HOW YOU INTEND ON CONTACTING YOUR PROSPECT OR LEAD AFTER GETTING THEIR INFORMATION.

Many people in sales opt straight for a phone call. This method is completely fine, and if you are good with the phone it is quite effective and cuts right to the chase.

Another route available, however, is adding these leads you get into what is called an **email funnel**. An email funnel is a series of emails that are sent, often times automatically, in a planned succession, and they further warm up the prospect.

THE PURPOSE OF THE FIRST TWO OR THREE EMAILS GOING TO THE NEW LEAD IS TO BREAK THE ICE GENTLY AND BUILD TRUST BY OFFERING MORE HELPFUL INFORMATION ON A TOPIC YOU ARE BOTH INTERESTED IN.

The third or fourth email is where you may request an appointment.

THIS FUNNEL APPROACH IS OFTEN MORE SUCCESSFUL THAN A DIRECT CALL AFTER LETTING A PROSPECT READ A REPORT OR WATCH A VIDEO YOU PRODUCE BECAUSE IT FURTHER BUILDS YOUR RELATIONSHIP.

The best part about funnels is that they are triggered to be sent after someone enters information; you only have to write your funnels one time, since the reader will already know what the topics relate to and why they are reading them.

It further strengthens the success of retargeting banner ads, which will be discussed shortly.

Before we get to that, however, let's make sure you have everything in place that you will need to start getting leads.



Facts are facts. These days your website is one of two integral hubs your new prospects are using to interact with, research and contact you.

NEARLY 90% OF CONSUMER DECISIONS ARE MADE AFTER LOOKING UP A PRODUCT OR SERVICE ONLINE.

The consensus is clear: ***clean and informative websites that speak to the prospect convert more business than a site that is lacking or nonexistent.***

With that in mind, it's worth your time to make sure yours is as polished and up-to-date as it possibly can be.

While many BGAs and carriers equip advisors with sites or templates to use, most still offer the ability to customize and personalize the content.

With your home page being one of the primary channels a prospect will use to reach you, we've created a checklist with descriptions of the critical elements you must have in place to optimize prospect experience.

HOME PAGE

This is the main page of your website. And there is one rule above all others it must follow - put the visitor's expectations and joy to use first.

The best websites are customer-centric. They are designed to provide the information visitors seek and present it in an interesting, organized fashion.

You want the customer to see the real you, which then builds trust. With that in mind, the first thing you need to do is:

Introduce yourself, stress what makes you special and talk about what you can do for your prospect in the first paragraphs.

INTRODUCTORY VIDEO

In addition to a couple short paragraphs about what makes you the solution to their problems, a professionally shot video of yourself reiterating

this message near the top of your home page can say more than words alone ever could.

IT'S SAFE TO SAY THAT NOTHING WILL WORK AS EFFECTIVELY ON YOUR WEBSITE AS A WELL-PRODUCED VIDEO OF YOURSELF SPEAKING FROM THE HEART ABOUT WHO YOU ARE, WHAT YOU CAN DO FOR SOMEONE AND WHY YOU WANT TO HELP THEM.

Let them know that you are a real person, just like they are, and you will instantly become far more trustworthy.

Latest news/blog/pressing and helpful content you have available. This is a little trick that will always keep your website looking fresh and relevant. You want to make sure that whatever your prospecting strategy is, you're keeping the most recent opportunity/news right on your home page so people don't have to take extra steps to search for it.

It keeps you looking like you're on top of your business and it helps prospects and clients make sure they don't miss anything important.

Easy to find contact information. The name of the game is to be everywhere. You want to make sure that people who visit your site can easily find how to contact you. That often means adding your name, office address, email and phone number in as many locations on the website as possible.

Use a large call out near the top of your home page and make sure you also include it further down, in your footer region, on every page as well.



CONTACT FORM

It should come as no surprise that not all prospects will pick up their phone or open their email and contact you directly looking for a purchase or advice.

Most will insist that you contact them.

So make sure that on every single page of your website - especially your home page - you offer a contact form for prospects to fill out.

When selecting what information to put on your form - keep in mind that less is more. That is, the less work you initially ask of someone, the greater your success ratio will be. For example, a name and phone number or email address is often all you need to get the ball rolling. You can get their address, interests, date of birth, etc. later.

QUOTE ENGINE

Installing a quoting widget on your home page can drastically enhance the interactivity on your website.

Some quoting engines may give an actual quote after entering information, but others can be used as a contact form where you call on the prospect to get further information for your quote.

MENU

As stated above, you need your site to be clean and easily navigable. Just think about how many websites you've visited in the past and became infuriated with how difficult it was to find what you assumed to be the simplest of things only to leave the site entirely frustrated.

Don't ever let your prospects feel that way about you. Your menu, along with your home page message to your prospects, will speak volumes when it comes to how professional and caring you are. With that said, below are a few must-haves in your menu, if you are able to customize one:



BLOG/ARTICLE PAGE

The first couple of paragraphs on your home page are far from the only area on your site you want to infuse your personality and mission for why you are the right candidate for the prospect. Your own blog postings are another perfect outlet to show who you are and how you can help.

Blogs and articles are also critical components to drive traffic to your website from social media sources. In addition to traffic, frequently updated blogs skyrocket website rankings and searchability from sites like Google and Bing.

IN OTHER WORDS, THE MORE BLOGS YOU WRITE (AND ANYONE CAN WRITE ONE), THE EASIER YOUR POTENTIAL CLIENTS CAN FIND YOU.

When writing a blog, much like your introductory paragraphs, make sure that while infusing your personality through the piece that you keep the focus on solving a problem for your prospects that he/she may have or face in the future.

Another note here is to keep calls to action for the prospect to the very end, if at all.

When sharing articles, allow the link to open in its original source as a new window or tab so that your site is still on their computer after they've read and digested the information.

REPORTS | GUIDES | OTHER HIGHLY USEFUL CONTENT

While much of the information on your site is passive information, asking your clients to contact you or fill out a form if they so choose, another section of your site that - depending on your strategy - may include more involved and useful guides, videos and other content.

This page should have offers for free material; however, unlike blogs and articles, the information behind these pages is much more involved and perceived as more valuable and useful to prospects.

Access to reports, guides, instructional videos, etc., behind this page will come at the price of information, namely, the prospect's contact information for you to follow up with at a later time.

Where your home page will have a couple paragraphs about why you are in this business and how you can help your clients, the focus should be the benefit of your clients.

Your About page on your website is your opportunity to dive deeper into your biography and why you chose this career path. Why you are driven to help clients. What accolades you received, licenses you hold, degrees earned and hobbies pursued.

It might seem like an afterthought for a website page. But the reality is that because of the nature of this industry and it's high-trust requirements, your prospects will use your About page as a resource to determine how suitable you are for them. In other words, make sure it helps establish your credibility, however possible.

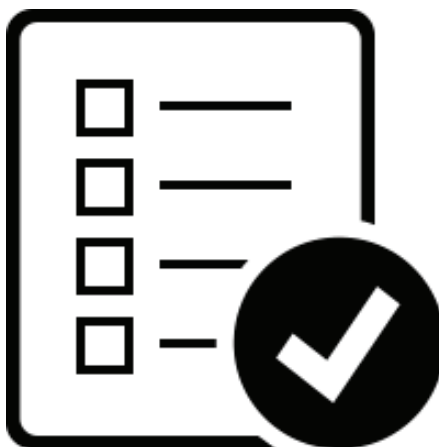
TYPES OF INSURANCE AND PRODUCTS YOU DEAL WITH AND QUOTES

While mentioned that your home page should -

if applicable - offer the ability to host a quoting widget, a dedicated page that details the sort of insurance and financial products you work with is also essential.

Here, you can list out the various coverages you offer and stress the importance of each. You can also demonstrate your knowledge by listing examples and situations where certain coverages would be required or beneficial and - perhaps more importantly - let prospects know to contact you to make sure they don't need coverages.

With your website taken care of it's time to approach the other major hub of interactivity your prospects are already using with great frequency - social media pages.



SOCIAL SELLING



If you don't have a social media page for your business, you need to get one. Most importantly, you must have a business page. Do not use your personal one.

Social marketing is the new way businesses interact and market to prospects and clients. It's where awareness is generated and expertise and demonstrated. And it is where your prospects spend much of their time when online.

Like your website, your social media page is another digital storefront. And it needs to be filled out completely. You want to make sure it has far more than your basic contact information. Most sites let you post quite a bit about who you are and what you can do. Make sure this is evident everywhere.

When done right, many businesses thrive on little more than social media campaigns and their brand's personality.

The reason is simple: People buy people. They buy brands. They buy stories. They buy what they know, what they can relate to, and who can help them. They buy feelings and status. Not necessarily products.

Sounds a lot like the insurance and financial business doesn't it?

THAT SAID, YOUR SOCIAL PRESENCE IS A PLACE FOR YOUR BRAND, YOUR UNIQUE ATTRIBUTES TO TRULY SHINE.

If they see you helping them often, they'll remember you over your competition every time. And when it comes to your social presence, that's the goal.

So what do they want to see?

- Video (why you should consider a professionally crafted message)
- Meaningful blog or article (preferably one you wrote that takes them to your site or landing page) with an image
- Heart-warming meme (you need to make them smile from time to time)
- Shared article you didn't write that helps solve a common problem
- Opportunities they didn't know about, things to do in the area or photos of you having fun at events around town
- Your latest offer

SOCIAL SELLING IS ABOUT BEING SOCIAL NOT SELLING

OVERWHELMED?

TBA has a dedicated marketing team here to help you decipher what will work best for your target market. Contact Morgan & Alisha today at 865.588.9555 for help in making the most of a marketing strategy that will be unique to you!