



TOP ADVISOR
MARKETING



5 STEPS

TO CREATING GREAT FINANCIAL CONTENT

HOW TO FILL YOUR ADVISOR BLOG WITH GREAT FINANCIAL CONTENT

5 steps to simplify the content creation process for advisors.

- Are you a Financial Advisor seeking to conquer online marketing?
- Do you have a burning desire to crack the online marketing code?
- Are you struggling to fill you advisor blog and website with great content?

Whether you want to establish trust with prospects, build influence or expand your business then this article will put you on the path to online marketing success!

ONLINE MARKETING RELIES HEAVILY ON VALUABLE CONTENT

The right content is critical to creating trust, influence, and inspiring new business opportunities. In my experience, it's taken over as the key online marketing strategy. Yet, so many advisors lack the ability and resources to pull it off. Let alone well enough to achieve the results they want and expect.

Over the past year we've worked with at least 20 advisors who've asked us for help advancing their content marketing strategies. We see advisors really struggling with content and we've been on a mission to help them solve it.

The most obvious obstacle impacting financial advisors struggle with content creation is that they don't have a process. Advisors need a process to be better at producing expert financial content. Below is a well-thought out process to help you on your journey to fill your advisor blog with great content and become a financial influencer.

STEP 1 – FINDING YOUR INSPIRATION

Good content is rooted in discovering great topics, ideas and concepts. This content should both inspire you to share it and be coveted by your audience.

To start, we encourage you to do some research and bookmark at least 5 to 10 websites that provide a breadth of ideas from experts who have similar or even contrasting opinions. You should be quickly inspired with others' opinions and how you'd apply these concepts with your target audience. You can also "follow" these people to see how they reach their audiences.

You'll want to write from your own perspective as often as possible. Your best ideas should come from your experiences working with prospects and clients.

- What keeps them up at night?
- What do they fear?
- What do they misunderstand?
- What do they avoid?
- What can they do themselves?
- What do the most successful clients do?
- Where do they make mistakes?
- How can they avoid mistakes?
- What questions can they ask themselves or the advisors they are currently working with?
- How can they "fix" mistakes they've made?

Most of our articles come from experiences and insights gained working directly with our clients. Inspiration comes from helping clients solve problems. When possible, look to solve financial planning challenges in your advisor blog and podcasts.

DO:

- Bookmark 5-10 websites within your area of expertise
- Bookmark 5-10 websites outside of your expertise but sites/blogs/podcasts that your audience are attracted to.
- Follow experts and influencers to see how they interact with their audiences.
- Solve problems. Overcome fears. Clarify challenges. Challenge conventional thinking.
- Show your personality when sharing your financial wisdom
- Speak to your ideal clients, not necessarily the ones who challenge you the most.

DON'T:

- Copy other people's ideas.
- Curate other people's content without adding your own thoughts.
- Try to become them. Be yourself.

STEP 2 – CHOOSE YOUR TOPIC

Some days you can't turn off the topic tap – it simply flows. Other days, it's a struggle. Regardless, on the days it flows, you should keep a list of topics and where or how you found the inspiration. This will help you on your "off" days. Don't fret when an "off" day hits. Use a process to beat it. This process.

Your topic should be something you have deep knowledge and experience with that your target audience values. If your clients tend to enjoy traveling, write a post about how even the smallest tweaks to one's financial plan can be the difference of traveling. Perhaps they can travel twice a year versus once per year or stay in a much nicer hotel.

DO:

- Test your topic with a few clients from time to time to make sure your content "speaks" to them.
- Choose a topic, not a title.
- Clarify what your topic means by making a quick note. I've come back to ideas and had no idea what I was meaning.
- Think about how you'd turn your topic into a list.
- Find positive ideas to help them. Turn any negative perspective into a positive opportunity.
- Focus on topics that are:
 - important, emotionally engaging and have huge impact,
 - they must be easy to solve, and you must be passionate about solving for your target audience.
- Ask yourself,
 - "What do my clients want to solve more than anything?"
 - "What has the best chance of significantly impacting my clients' wealth?"
 - "What are my clients blind too or unaware of that could really hurt their wealth/life?"
 - "What do my clients care most about in their life and plan?"
 - "How can I help adjust my clients' expectations?"

DON'T:

- Try writing your title before you start writing.
- Write about what you want, write about what they want. Sometimes, that means going against what you think they need. Find a balance with your articles.
- Don't focus on negative more than positive in your topics, titles and posts.

STEP 3 – START WITH AN OUTLINE

Most financial advisors and financial executives don't enjoy writing. That's just a fact in business and life. Regardless, we understand the importance of fresh and current content and here's how we get it done without too much procrastination. This might work for you too.

DO:

- Brainstorm on whiteboard (or mindmap online) 5-10 main points
 - Install a large whiteboard in your office. I use a Quartet 4' x 8' ceramic whiteboard.
Works good
 - Use MindMeister.com for mind mapping tool. It's one of the best.
- Group points into main points and sub points –
 - what's important, what's not
 - what's redundant
 - what's relevant
- Think of examples or analogies to clarify points
 - Has this happened to a client?
 - What could happen?
 - What's the potential impact of not getting this right, fixed or mitigated?
- If it's too complicated for a list, it probably should be an article – maybe a video or maybe not communicated at all. Complicated topics can however be led up to with content that introduces the challenge then leaves the details for a “Free Report & Analysis” or a webinar, seminar, one-on-one meeting.
- Be clear about the problem/issue that needs to be solved, the impact it may have and how to solve.
- Focus on lists when possible. Top 10 or less is a good guide.
- Create a catchy title, once you know every point in the article.
 - What's the most compelling introduction of this article?
 - What does it solve or make possible?
- Find tie-in (why) in opening and ending paragraphs.

DON'T:

- Create huge lists. 5 is optimal. More than 10 is too much unless it's a checklist.
- Write before your whiteboard or mindmap has been completed.
- Force a topic you're not ready to write about.
- Rush an article.

STEP 4 – CHOOSE MEDIA

Content these days comes in so many forms. Not all people like reading blogs; some prefer video and others images, charts, drawings, etc. The simpler the message, the simpler the media. For instance, the simpler the concept the more likely it can be diagramed. The more emotionally engaging a topic is, the better it may be to use audio or video to convey that emotion/passion.

DO:

- Start with what you're most comfortable with.
- Try media you're not comfortable with but could get better at – video.
- Consider what your audience will prefer.
- Use multiple media formats to expand your horizon and meet the on-demand needs of your audience.
- Set an appropriate level for quality of work no matter what media used. If you choose to write, make sure it's grammatically sound. If you produce a podcast, make sure your audio quality is good or better.
- Use visual tactics to convey points. A whiteboard video works perfect for this. Alternatively you can have a graphic designer develop a diagram or chart to get your point across.

DON'T:

- Decide to do video and have poor lighting and video quality and think that will boost your credibility.
- Publish via a medium that's not up to the standard your audience expects.
- Overcomplicate producing content. Keep it as simple as you can and get it out the door.

STEP 5 – PRODUCE & PACKAGE CONTENT

Content is always more enjoyable when it's presented properly. Presentation of content has several variables:

- Text formatting: font size (should be 12-14), organization of thoughts (use lists), highlighted sections/ points (make it easy to review key points), font style (use a common, easy to read font), short paragraphs (keep the story moving, use brief paragraphs then move onto next point)
- Design style: stick to your brand's color palette as much as possible, use lots of whitespace, use logo properly, stick to stock imagery you've agreed to and/or that's consistent with:

DO:

- Cross promotion, embrace the opportunity to introduce other articles, offers, videos, etc. – this helps people experience you
- Add text to imagery, take a key phrase or the title of each article/video and graphically add it to the image that represents your content – this is always more interesting than just a simple image – it shows effort too
- Keep to a standard of design and presentation
- Produce at least 2 pieces of content a month
- Turn one piece of content into many when possible

DON'T:

- Take shortcuts on making your content look good-great
- Be a perfectionist – good packaging doesn't mean perfect packaging – at some point you have to get this out the door and on your blog

CONTENT...YOUR KEY TO MORE SUCCESS

Content may be the key you've been searching for to open your mind and your front door to new opportunities and a better understanding of your value to your clients. Content creation is business changing, not just because it helps you expand your network, but because it teaches you to create and better understand value in your business. It helps you connect better with your audience because you are constantly being challenged to speak to your audience's fears and needs. It fills your advisor blog and podcast with great content that will leave ideal prospects wanting more.