

# CREATING VOICE WITHIN THE CUSTOMER JOURNEY

Martin Saavedra, Jr., Executive Vice President of MLI Marketing Solutions, led attendees of this NAIFA webinar along customers' "path to purchase," providing insights into how advisors, especially independent advisors, can have a voice and be relevant to their clients and prospects.

It isn't always a quick process, Saavedra said, sometimes taking a full 365 days or more for some consumers. By making themselves relevant and creating a voice that stands out within the customer journey, advisors can sometimes shorten the timeline.

## WHAT DOES THE CUSTOMER JOURNEY LOOK LIKE?

It starts with **awareness**, Saavedra said. How is a consumer getting the information to begin the decision to enter the market? Often, a consumer will become aware of an advisor or the need for service through a banner ad, email, direct mail, or social media.

The next portion of the customer journey is **consideration**, when prospects consider what you have to offer by visiting your landing page. It's important to have navigation links, a search bar, white papers, podcasts, and other content that appeals to clients and sets you apart. These are things that increase your Repeat Visit Rate and amplify your voice with the consumer.

This is where it is important to identify consumers who are in your market and to keep consistent messaging and content. Make sure you go after the right consumers, Saavedra said. You then nurture those who are in your market and engaged with you by providing them relevant content organized in a clear and concise manner. It all leads to building a relationship, he said, nurturing the consumer to an engagement level where they feel comfortable.

Next is the **decision** portion of the journey. Be sure that you give potential clients as many ways as you can to engage with you. Always ask for an appointment, he said. Make it simple for them to do business with you.

Next is **onboarding**. This involves personal contact specific to an individual client to bring them to a final decision. But the journey doesn't end with that decision. The next step is **advocacy**, where you keep clients engaged and maintain good relationships with them. This is the point in the customer journey where a client will recommend you to family and friends or give you a poor rating or review or simply not say anything.



## DIGITAL MARKETING

Most advisors start at a disadvantage because digital marketing works best when you have a huge budget. “If you don’t have the big spend,” Saavedra said, “you have to be strategic and tactical.” That requires being perfectly in alignment with consumer trends in your area and constantly reevaluating and providing the right content. Rather than trying to compete nationally, it makes more sense to draw consumers from your local area. “Most advisors write the majority of their business within 25 miles of their office,” Saavedra said. “Use your environment to your advantage.”

Google Trends is a free tool that provides insight into how to align your content with your market. It can help you know what your clients are looking for, he said. When searching for trends with the tool, Saavedra suggests being valued-specific (that is, focusing on how you can help consumers) rather than product-specific. For example, look for trends in “retirement planning” rather than “annuities.”

You should also focus on your state, region, or subregion in Google Trends. Your area may be different than the national trends. It is important to structure campaigns to achieve established goals. Set those goals based on what consumers are looking for. Google Tag Manager is another tool that can help you align your digital presence with the voice your potential clients are looking for.

## THE STANDARD CUSTOMER’S PATH TO PURCHASE.

The Zero Moment of Truth study found that consumers are on the path to purchase for an extended period of time. Advisors need to be with the consumer along the path to purchase. Be prepared to be with them for the duration. The study also found that investment shoppers used an average of 8.9 sources of content on the path to purchase. Most influential in the path to purchase were direct experiences with financial representatives, shoppers said. These include meetings, calls, personal emails, and video chats. Advisors always need to be ready to engage, Saavedra said.

“Have a compelling offer and value statement,” he said. “This is why we’re different, it’s why we’re better, it’s how we’ve helped other consumers. Make sure customers know how you can help them when they are ready.”

[View “Creating Voice Within the Customer Journey” on-demand](#)

