



THE LITTLE BOOK OF INBOUND FOR

FINANCE MARKETERS

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INTRODUCTION

When we talk to marketers new to the practice of creating useful web content to attract new business, one of their number one concerns is that their products or services are not interesting enough to warrant blog posts, videos, ebooks, tweets or eye-catching photos. Marketers within the finance industry are particularly susceptible to this concern.

“Not interesting enough?!” we say. “Are you passionate about it? Do your customers have unanswered questions about your services? Do your employees have hidden talents? Does your company have a greater purpose beyond selling stuff? Of course your company is interesting enough!”

If ongoing research is anything to go by, finance is one industry that’s seeing an increasing level of demand for engagement over the Internet. And we’re not just talking about formal customer service.

Back in 2013, [Forbes](#) revealed that millennials are looking for more engagement from financial advisors and banks. They want advisors to connect with them using online tools instead of face-to-face conversations like they typically would have with older generations. 61% want video meetings with advisors and 57% will change to financial advisors that offer services via digital.



BEFORE YOU GET STARTED...

LET’S SEE [HOW YOUR WEBSITE IS DOING.](#)



Sure, marketing within the finance industry can be challenging -- in many cases, it is highly regulated and sales can be very complex. But nothing is impossible. All you need is a little bit of creativity, a pinch of company support, and the bandwidth and permissions to be a little bit gutsy.

Not convinced? Somehow, we didn't think you would be!

To help you along the way, we've put together this Little Book of Inbound for Finance Marketers. It is specifically tailored to you -- marketers within the finance industry -- and will guide you towards implementing remarkable inbound marketing for your company.

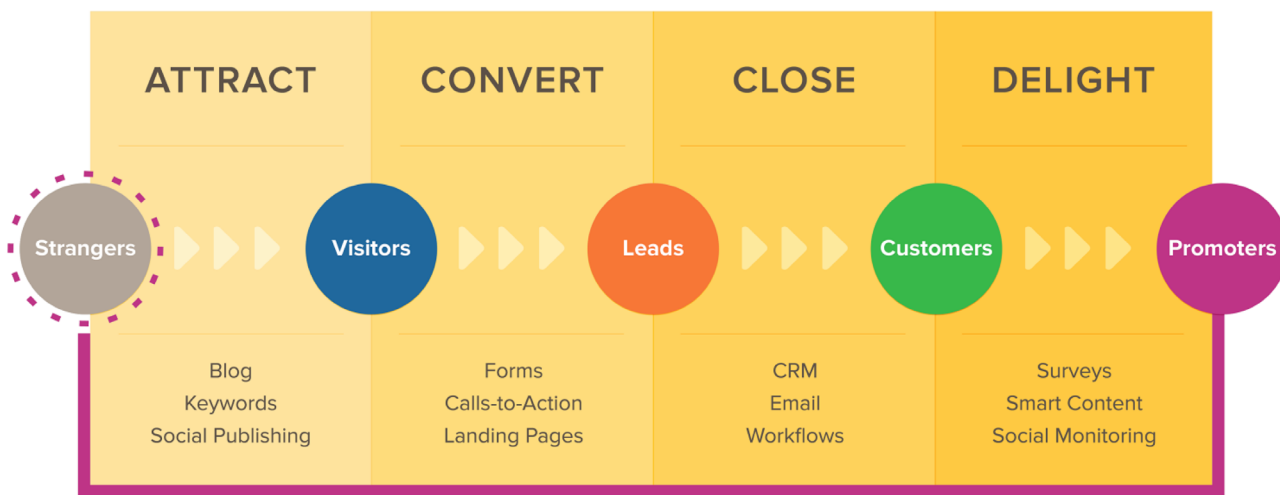
And to prove that inbound marketing can actually be interesting, fun and effective for finance companies, we have included some examples of companies from within the finance industry who are doing an exceptional job at inbound marketing. Areas covered in this ebook include blogging, long-form/downloadable content (such as ebooks), social media, email, CTAs, and landing pages.

So throw your calculator aside, sit back, and start thinking about how you can use this book to revolutionise your finance company's marketing strategy.

CHAPTER 1: INBOUND MARKETING

Inbound marketing is a holistic, data-driven strategy that involves attracting and converting visitors into customers through personalised, relevant information and content (rather than interruptive messages), and following them through the sales experience with ongoing engagement.

Over the past several years, marketers have witnessed a tectonic shift in strategy, from campaign-based interruption marketing, to a consistently measured, closed-loop inbound marketing strategy -- one that pulls interested customers to your company and creates lasting relationships. This new shift follows the increasing power held by consumers to research and interact with brands, companies, and service providers on their own terms and to extend their experiences (both good and bad) to the world via networks.



At its core, the goal of inbound marketing is to serve and delight customers, using buyer personas to develop thought leadership content, and then promoting this content through your various channels working together -- from social media outreach to SEO to automated email nurturing campaigns used to share specific content that adds value to consumers. Let's start with most basic element of inbound marketing: blogging.

CHAPTER 2: BUSINESS BLOGGING

Let's start at the beginning. What is business blogging?

Business blogging is a marketing tactic that uses blogging to get your business more online visibility. That definition raises two questions:

1. What is "blogging," though? I still don't know what blogging is!
2. What do you mean by "online visibility"?

Let's start with question number one. Blogging is the act of creating short-form content. A "blog post," is posted to your website's "blog" -- a part of your website where you house all of those posts.

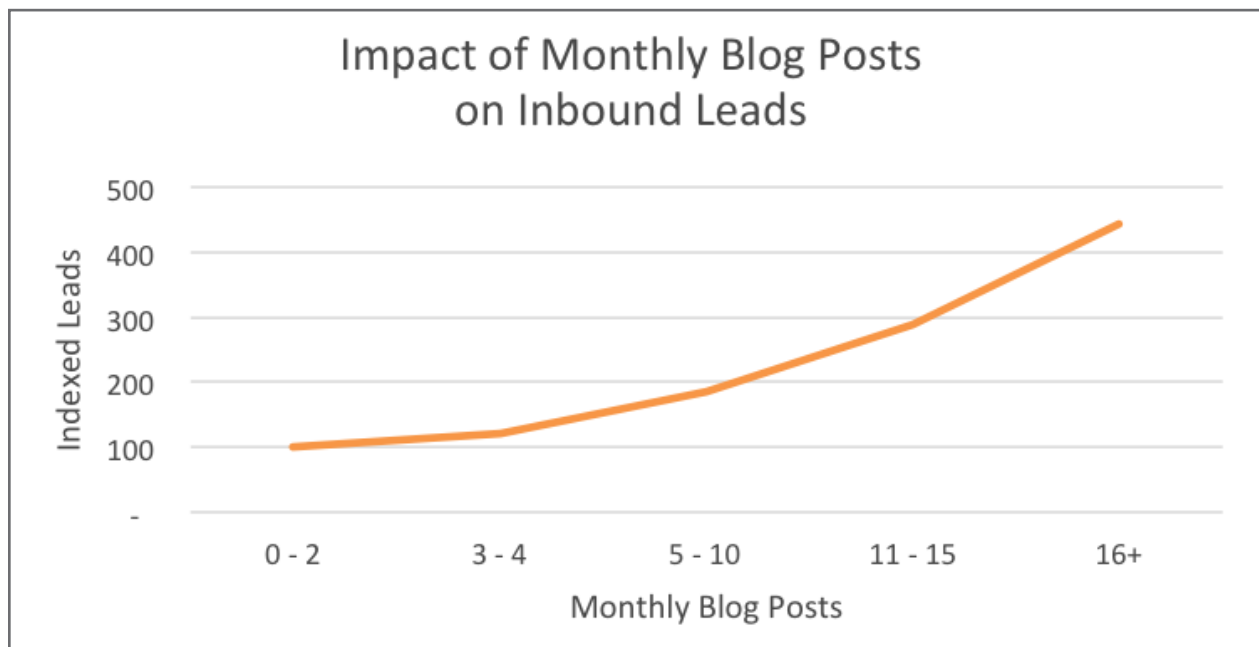
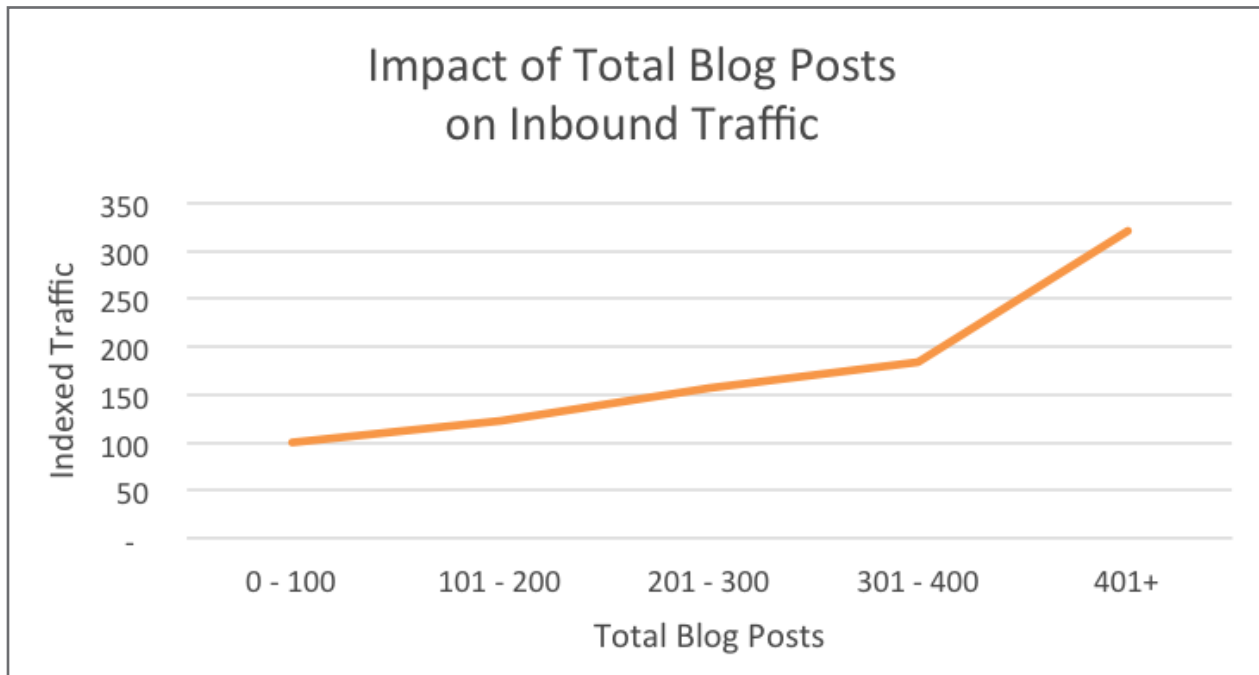
When you're doing business blogging, your blog posts are about a particular subject matter related to your business and of interest to your audience. For instance, HubSpot is an inbound marketing platform, so our blog talks about inbound marketing topics -- using Facebook and Twitter for business, email marketing, business blogging, etc. Your business blog will talk about subject matters that are related to your business -- finance.

If you're in banking, you might talk about savings tips, or keeping your credit card in check. If you're in investments, you'll report on investment best practices, as well as current trends. If you're in pensions, you'll talk about the importance of having a pension, guidelines on how to search for a pension broker, and the ramifications of not having a pension.

Now on to question number two -- defining "online visibility." Online visibility is exactly what it sounds like -- being able to be found and seen on the internet. This could mean your business pops up a lot in search engines, on social media, on other people's blogs as a guest writer, etc. Business blogging is one way to help get your business in front of people looking for your products or services on the internet.

Don't believe us? Did you know that companies that blog generate **55% more website visitors, 97% more inbound links, and get 67% more leads** than companies that don't blog?

And how often should you blog? [New 2015 data](#) suggests that **companies that publish 16+ blog posts per month got almost 3.5X more traffic than companies that publish between 0 - 4 monthly posts, and about 4.5X more leads.** Check out the graphs on the next page for more insights into how blogging affects traffic and leads.



So what does this mean? How often should you blog? If you're just starting out, start by posting 1-2 blogs per week. Based on our 2015 data, **this could increase your traffic by 50%**, and as much as **double your number of leads**.

2.1 Blogging Tips for the Finance Industry

1. Spend time researching your buyer personas.

Knowing who your buyer personas are is a key step towards building a successful blog. A buyer persona is a semi-fictional representation of your ideal customer based on market research and real data about your existing customers. Without knowing who your ideal customers are -- their backgrounds, goals, challenges and how your product or service will benefit them -- it's very difficult to create content (or in fact, an effective overall marketing strategy) to attract more of those types of people at the right time. Without understanding your ideal customers inside and out -- and integrating that research across your entire marketing funnel -- you risk stifling the growth of your business.

Spend time researching your customers and speaking to front-line employees. There is a TON of useful tools and resources you can use to develop strong personas that will help you drive your content creation appropriately ([here are twelve!](#)).



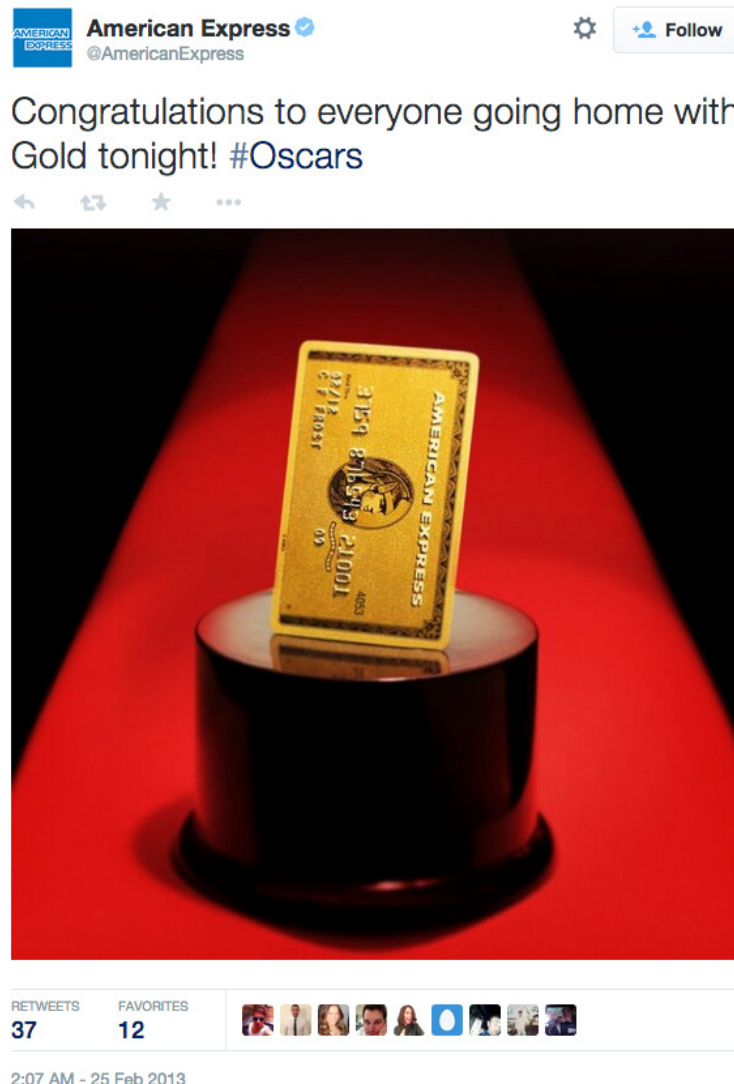
TOP TIP:

Not sure where you should start when creating your buyer personas? Check out the HubSpot MakeMyPersona tool to give you a head start.

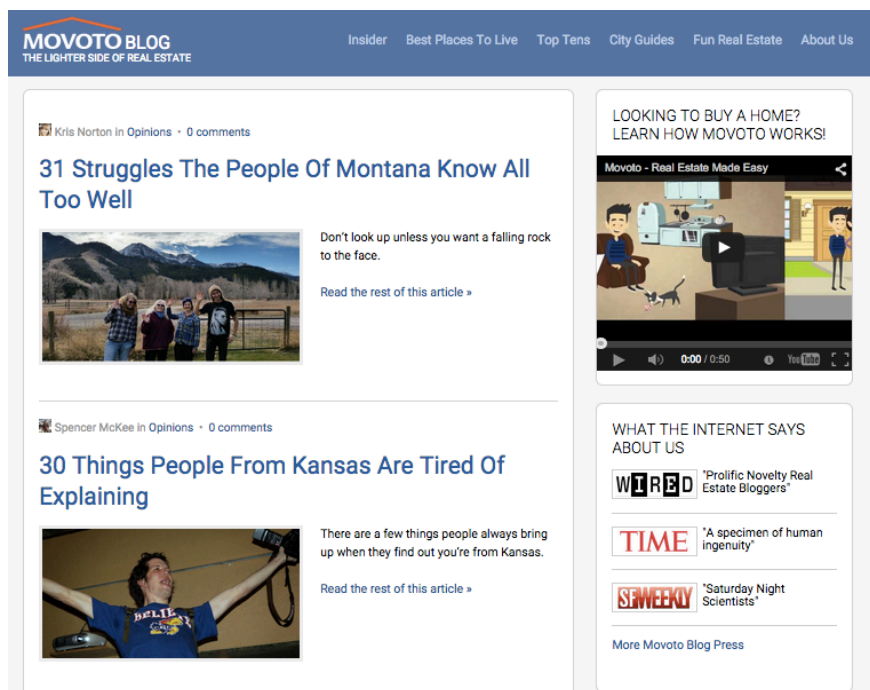
[MAKE MY PERSONA](#)

2. Create a content calendar, but remain flexible.

It's important to plan your content in advance. However, it is equally important to remain flexible so you can newsjack an emerging news story or trend. Sign up for Google Alerts and choose keywords relevant to your industry ([here's how](#)), and keep an eye on leading industry publications for newsworthy pieces you think would interest your audience. But remember, you can also [newsjack](#) non-industry news -- remember how American Express newsjacked the Oscars a few years ago?



Sometimes, the key is to think outside of your industry box. Real estate company, Movoto has done a really good job of this. Rather than keeping their blog limited to content surrounding topics around real estate, the team at Movoto creates really interesting and entertaining blog articles that appeal to a broader audience. Examples of these are shown below. By following this strategy, Movoto has managed to increase its website visits from 2,000 per month to a whopping 18,000,000 per month. Read more about how they achieved this [in this article](#).



3. Avoid financial jargon.

Jargon scares people. They get confused, and it's off-putting. This does not mean that you should fill your content with slang or sloppy English. Write accessibly, and in a way that is easy-to-understand.

4. Cite credible sources.

Make sure to refer back to credible sources if you are referring to the likes of legislation, acts, or new trends. This adds weight to what you're saying.

5. Tap into in-house knowledge.

Take advantage of people in different departments within your company who have a wealth of knowledge about the industry, clients, thought leaders, trends, and insights. As marketers, we don't always have the technical know-how or even data to back up a blog post or longer-form content we want to write. Tapping into in-house resources is something that can effectively fill that knowledge gap.

6. Interview people.

If nailing people down internally to write blog posts is proving difficult, schedule an interview with them so they don't have to write. Just record the interview and turn it into a blog post. This means that you're still tapping into their knowledge without making people take the time they may not have to write a 500-2,000 word blog post.

2.2 Best in Class

Goldcore is Ireland's most established and trusted gold broker, and one of the leading gold brokers in the world, serving clients in over 45 countries internationally. The team at Goldcore has a very good understanding of their buyer personas, which has led them towards creating content that is of great interest to their target audience worldwide.

Goldcore has used its blog to establish and position itself as a thought leader in gold. In fact, the Goldcore blog is regularly featured on specialist gold, finance and investment

blogs around the world. It is also read by mainstream financial journalists and quoted in the likes of Reuters, FT and Bloomberg.

The Goldcore blog has also become one of the most shared specialist finance and gold blogs in social media, attracting a lot of attention on Facebook, LinkedIn and Twitter. Twitter, in particular, has worked well for Goldcore, as the blog houses industry news as it happens, as well as topical commentary -- something Twitter users (and Goldcore's buyers personas) are hungry for. Looking at this screengrab of the Goldcore blog, notice how content is very current and timely.

The screenshot shows the Goldcore website interface. At the top left is the Goldcore logo. The navigation bar includes links for HOME PAGE, OUR PRODUCTS, OUR SERVICES, MARKET DATA, KNOWLEDGE, and CONTACT US. A search icon is also present. Below the navigation bar, there is a contact number (+353 1 6325010) and a market data section showing prices for Gold (€1,119.15, +0.57%), Silver (€15.00, +1.11%), and Platinum (€1,067.70, +0.71%). A yellow button labeled 'OPEN YOUR ACCOUNT' is visible on the right.

The main content area features a left-hand navigation menu with categories like KNOWLEDGE, ABOUT US, FAQ, RESEARCH, MEDIA, HOW TO GUIDES, GOLD BLOG, and NEWS ARCHIVE. The central content area displays two news articles:

- 20 APR 2015: Greek Debt Crisis Coming To Head – “Second Currency” For Greece?** - Greece Rapidly Running Out Of Cash – Soon Must Fold To Troika Or Default – IMF Rebuff Greek Suggestion To Delay Repayments – ECB’s Draghi Warns Potential “Grexit” Puts EU In “Uncharted Waters” – Despite Threats, Greece Remains Defiant, Won’t “Budge On Red Lines” – ECB Considering A “Second Currency” For Greece The Greek [...]
- 17 APR 2015: Gold Flat On Week Despite Growing Risks** - MARKET UPDATE Today’s AM LBMA Gold Price was USD 1,204.55, EUR 1,113.83 and GBP 801.86 per ounce. Yesterday’s AM LBMA Gold Price was USD 1,204.60, EUR 1,131.19 and GBP 811.40 per ounce. Gold fell 0.29 percent or \$3.50 and closed at \$1,199.00 an ounce on yesterday, while silver rose 0.18 percent or \$0.03 closing at [...]

Each article includes a 'CONTINUE READING' button and social media sharing icons for Facebook, Twitter, LinkedIn, and a plus sign for more options. The right-hand side of the page contains a search bar, a 'POPULAR' section with recent articles, and a 'CATEGORIES' section with a list of categories and their respective counts.

Goldcore doesn't just use the blog to update its readers on much-sought-after commentary. As well as serving to establish Goldcore as an expert in gold, the blog also aims to educate, build trust and generate leads and clients. The blog is used to drive users to longer-form content (discussed in the next section) to generate leads. Check out how they do this below.

The screenshot shows the Goldcore website interface. At the top, there is a navigation menu with links for HOME PAGE, OUR PRODUCTS, OUR SERVICES, MARKET DATA, KNOWLEDGE, and CONTACT US. Below the navigation, there is a status bar displaying gold prices (GOLD: €1,140.18, SILVER: €15.53, PLATINUM: €1,096.07) and a contact number (+353 1 6325010). A search bar is located on the right side of the header.

The main content area features a blog post titled "From Bail-Outs to Bail-Ins: Risks and Ramifications" dated December 2, 2013, by Mark O'Byrne. The post includes a list of topics covered in a 50-page report, such as "What are Bail-Ins?", "Cyprus – The First EU Bail-In", and "How Likely are Bail-Ins?". A call to action button labeled "CLICK TO DOWNLOAD" is present.

Below the main content, there is a section titled "BAIL-INS ARE COMING!" which highlights that the 50-page eReport is a "must read" for every depositor. It lists key points from the report, including "Why Bail-Ins are important", "What are Bail-Ins?", "How likely are Bail-Ins?", "Where will Bail-Ins take place?", "How to protect your deposits?", and "The 60 safest banks in the world". An image of an open book representing the report is shown next to the text.

On the right side of the page, there is a search bar and a "POPULAR" section listing the featured article. Below that, there is a form titled "Get Your Bail-In Report Here" with fields for First Name, Last Name, Country, and Email, and a "CLICK TO DOWNLOAD" button.

With blogging at the centrepiece of everything Goldcore does, **the number of leads generated per quarter has increased over 80% in two years.**

Maintaining such a useful, relevant and timely blog has made building a social media following easy for Goldcore. With nearly **24,000 followers on social media** at the time of writing (Twitter 13,300+ & 4,250, Facebook, 5,625+, LinkedIn 328, Youtube, 850+), Goldcore is one of the most widely followed gold bullion dealers in the world -- all because of great content.



TOP TIP:

Don't be afraid to be ballsy in terms of bold headlines/ titles - providing they are true to content. Sometimes I feel like a tabloid editor when searching for a good headline but it really is important to gain that all-important reader attention -- and our metrics prove this.

Mark O'Byrne, Marketing Director at Goldcore

CHAPTER 3: LONG-FORM & DOWNLOADABLE CONTENT

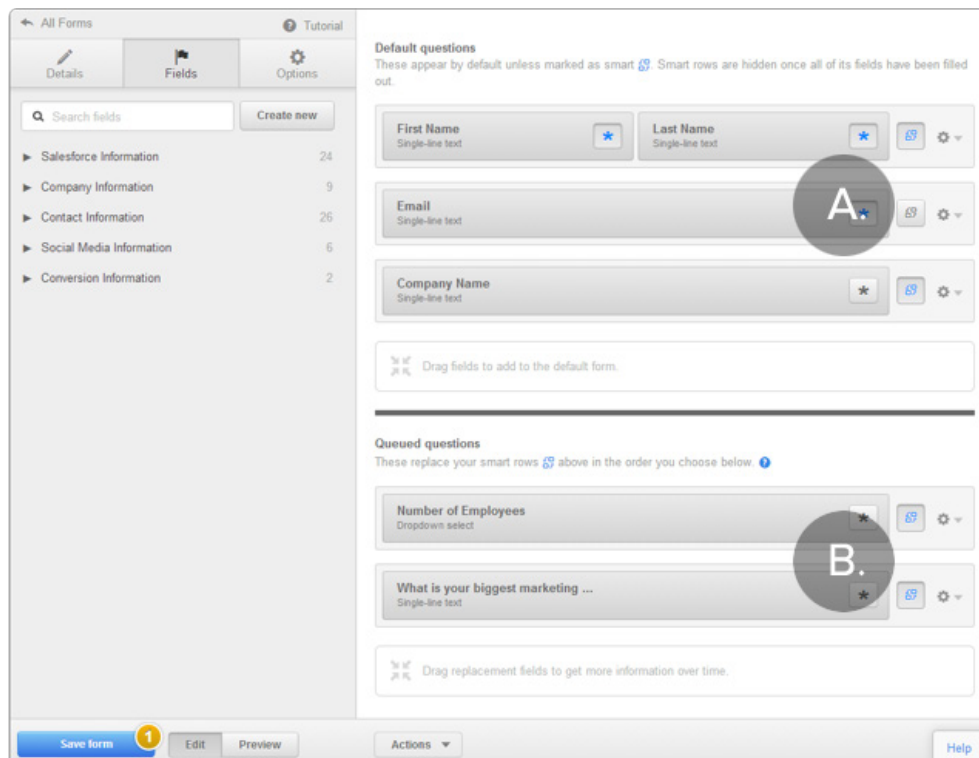
Long-form and downloadable content refers to -- yes, you guessed it -- content that is longer and requires more investment than a typical blog post. This kind of content can take the form of ebooks (like this one!), reports and whitepapers. We're also placing content such as webinars, templates, kits ([like our inbound marketing kit](#)) and tools (like our [MakeMyPersona](#) tool mentioned earlier) into this bucket. These types of content are really useful assets to have in your arsenal, and are essential when it comes to generating leads.

How does a piece of content generate leads? Usually a longer piece of content (such as an ebook) is gated by a landing page. To gain access to the content, one must enter their details (name and email address at the very least). Essentially, you "pay" for the content with your email address. In the case of webinars, usually email addresses are captured as part of the webinar sign-up process. For tools -- for example if you built a tool to help people calculate tax payable for the year based on input earnings -- you could request an email address in exchange for the tool's output.

For most companies starting out with inbound marketing, once you have an email address for someone who is consuming your content, they become a lead which you can then nurture towards becoming a customer with more relevant content. With each interaction, you should aim to get more information about them (such as company size, industry, phone number). This is done using [progressive profiling](#), which refers to iterative forms that enable you to designate which questions appear in a form based on

what you already know about that particular lead. By employing progressive profiling technology, every time a lead fills out a form, you are progressively collecting valuable new information about them while keeping your forms short and easy to complete. This enables you to build up the amount of information, or intelligence, you collect about your individual leads without causing more friction in the conversion process. The more intelligence you build up about a lead, the more personalised an experience from prospect to customer you can offer.

The screenshot below shows how you can set up progressive forms in HubSpot by simply queuing questions (see B below for queued questions which appear after default questions (A) have been answered) based on what information you want to find out about a particular prospect or lead.



Screenshot taken from within the HubSpot portal

3.1 Long-Form Content Tips for the Finance Industry

In addition to the blogging tips listed earlier in this ebook, we suggest the following:

1. Create Step-by-step content

Whether you are creating ebooks, hosting webinars, or designing infographics, strive to present “how tos” in step-by-step detail. Your audience will love you for it. When it comes to complex scenarios, it is wise to use real-life examples. For example, if you are a mortgage broker, lay out a number of possible real-life scenarios to help the reader really understand what you’re trying to say.

2. Invest in building tools to make your audience’s life easier.

Whether it’s a tool that calculates tax payable as mentioned above, a budgeting tool, or a tool that delivers an investment plan based on data the users input, building tools your audience loves will help to supercharge your lead flow. Tools take expertise to build, and are more costly than traditional long-form content. However, the right tool can dwarf your other content in the long run in terms of lead generation.

HubSpot’s marketing grader is a prime example of this, having graded over 4 million websites since 2006. Within the finance industry, a really good example of a simple tool (that you can use for free in exchange for an email address) is [BudgetSimple](#) which helps you to manage your personal finances.



3. Make your content easy to share.

Include [sharing buttons](#) in your ebooks. Making content easy to share means that if your audience likes what its reading, your readers will be likely to share it socially. Use tools like [Click To Tweet](#) to make things super-easy to share on Twitter. If you already have some ebooks, why not try placing some click-to-tweets within one of your most popular ebooks to see if you can generate some social sharing?

4. Include a key/jargon buster.

A really great idea is to include a jargon buster just after the introduction of your ebook. This means that your readers can refer back to it if they need to and makes your content instantly more accessible and digestible.

5. Report on unique data.

Interviews are a great way to save time getting great content on your blog, but for data-driven posts or longer form content, it's important to be relevant and accurate. Cite data from trusted sources only, or run your own data collection. Goldcore (mentioned earlier) invests lots of resources in conducting its own highly valuable research, which is one of the reasons it has become such an authority.

Surveying your clients or the general public using free survey tools like SurveyMonkey is also a great way to collect data. Survey data is unique and you can answer questions that other people aren't by designing your own survey. For example, those in banking could report on the change in the number of people planning to take out a mortgage year-on-year. Insurance companies could report on the increase of people taking out insurance on brand new cars. There are endless opportunities when it comes to data-driven content.

6. Make your landing pages shine.

Landing pages typically gate your long-form content. For many companies, landing pages generate a sizeable portion of their organic traffic. It's worth remembering that if your landing page ranks in organic search, it may be the first point of contact someone has with your site -- so make sure it speaks for itself. Push the form and explanatory text as high up the page as you can – this will help with conversions.

Lose your navigation, and make the landing page less about your brand and more about your content. Summarise clearly what the value is of the content your landing page visitor is about to download. And don't forget those progressive forms!



TOP TIP:

Need help with your landing pages? You'll love this guide!

[CHECK IT OUT!](#)

7. Experiment with co-marketing.

A great way to expand your reach is by doing some co-marketing with a relevant partner. One example would be for a mortgage broker to write an ebook with a surveyor or real estate agency for tips on buying your first house. The ebook will not just carry more credibility, but you can also agree for it to be promoted to both your databases, which helps to broaden reach substantially.

3.2 Best in Class

Finance Modelling company F1F9 does an exceptional job of creating some really

great resources for its target audience. They make the subject matter interesting and engaging, which they succeed at because they understand their personas very well. Their content is really well laid out, and is gated by some great landing pages.

As well as the ebooks and webinars, the folks at F1F9 have developed a 31 day course on Financial Modelling which is hugely popular. In two years, it has received **over 10,000 sign-ups over the past two years** and continues to be a great source of leads. The 31 day course was built to serve the needs of their personas whose key challenges revolve around developing financial modelling. A key priority of many of F1F9's personas is keeping up-to-date with key financial modelling standards, as well as continuously developing their skills in this area. This course promises to teach you the basics of the FAST modelling standard, and teaches some practical and highly effective modelling skills. The course is completely automated using workflows, which means that once somebody signs up to the course, they will receive the tutorials via email every day without any manual intervention.

The course is gated by an attractive landing page which highlights the value it offers. This landing page can be seen on the next page. An in-depth assessment of what makes it effective follows.



TOP TIP:

Not sure how workflows can help your inbound marketing?
It's time to learn!

[LEARN ABOUT WORKFLOWS](#)

F1F9

1.



FREE 31 DAY COURSE

2.

IN AROUND 10 MINUTES PER DAY FOR 1 MONTH, THIS FREE ONLINE FINANCIAL MODELLING COURSE WILL TEACH YOU THE BASICS OF THE FAST MODELLING STANDARD, AND SOME PRACTICAL AND HIGHLY EFFECTIVE NEW MODELLING SKILLS.



3.

Each day you'll receive a short video tutorial together with daily notes, downloadable excel files and useful reference guides.

4.

FIRST NAME *

LAST NAME *

COMPANY NAME *

EMAIL ADDRESS *

JOB TITLE *

COUNTRY *

PHONE NUMBER *

5.

6.

WHAT COMES NEXT?

1. SIGN UP FOR THE FINANCIAL MODELLING COURSE.

Sign up using the email box above and we'll get the first tutorial out to you straight away.

We won't share your email address with anybody and we won't send you anything you don't want.

7.

2. SET ASIDE 10 MINUTES PER DAY TO WATCH THE TUTORIAL THAT WE'LL SEND YOU BY EMAIL.

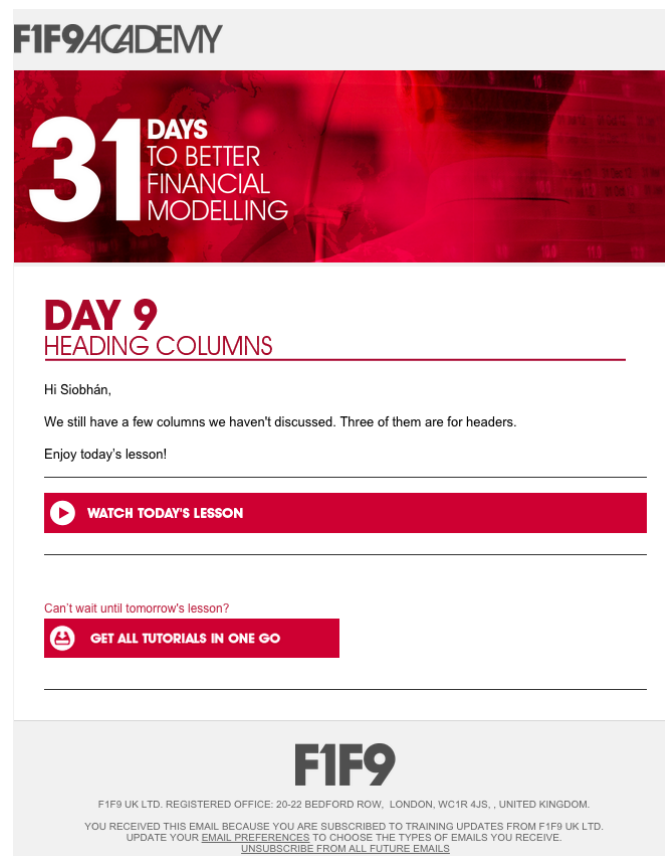
We'll also send example models and reference guides.

3. PRACTICE.

Financial modelling is a practical skill and requires practice. This introductory course is a great place to start.

What makes this landing page so good?

1. **No navigation** present to distract the prospect.
2. **A clear, compelling headline**, communicating exactly what is on offer.
3. **A high-quality video, complete with testimonials** from people who have completed the course.
4. **A short blurb detailing further the challenges this course solves for.**
5. **A form** to capture the prospect's details.
6. **A call-to-action** that redirects to a thank you page.
7. **More details** about what can be expected from the course.



Once someone signs up for the course, they receive an email every day for 31 days (see above). Each email contains a link to that day's lesson. The emails are ideal -- short, simple and to the point.

BLOG

ASSESSING ROI OF YOUR FINANCIAL MODELLING TRAINING – 5 QUESTIONS TO ASK

The best courses will recognise that there is work to be done once the classroom course is finished.



BANKING & ADVISORY

ENERGY & NATURAL RESOURCES

And that's why at F1F9 we are investing so much in online support for what happens post course. We want to help our course alumni influence as much as we can the outcomes of their organisations.

What engagement will I have with the training provider once the course is over? How will they help me make improvements once I am back at my desk?

Calls to action are placed at the end of relevant blog posts, which helps to drive traffic to the course landing page.

31 DAYS TO BETTER FINANCIAL MODELLING
A FREE INTRODUCTION TO THE FAST STANDARD

GET STARTED NOW



Course materials take the form of videos, notes, and downloadable excel sheets and guides.

Of course, having the landing page on your site is one thing, but it won't attract traffic by itself. The page is frequently shared on social media, and support blog posts are written regularly on the topic of financial modelling that feature a clear call-to-action at the end, which leads to the course landing page (example shown above).

F1F9's content is exceptional and as a result, it is regularly linked to by the media and other blogs. This helps drive further web traffic, while at the same time enhancing F1F9's search engine visibility.

F1F9 started inbound marketing in May 2013. It now drives around an average of **750 leads each month**. Typically, around **300 of these leads are from organic search**. As well as increasing leads, traffic has also increased sixfold to **60,000 visits per month**



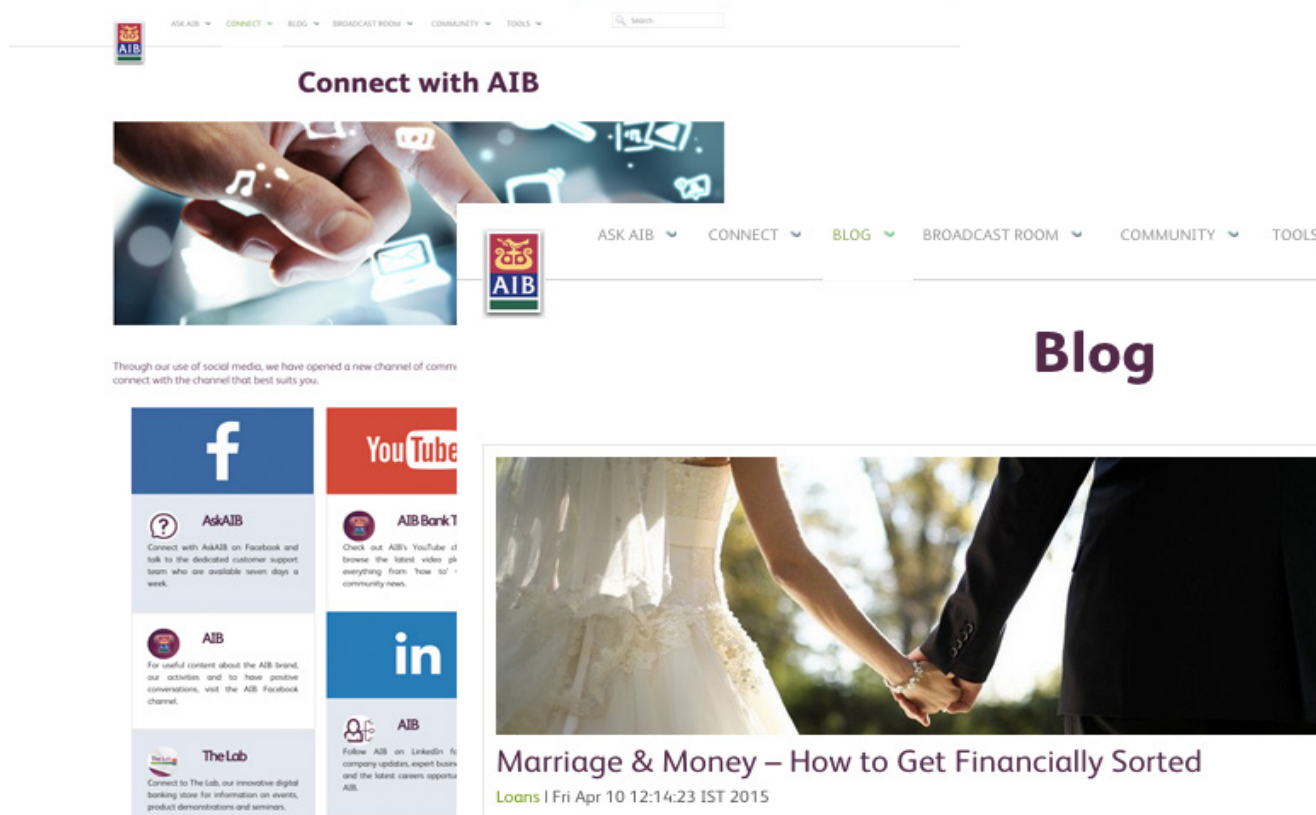
TOP TIP:

Especially in the finance sector, people gravitate towards a very serious tone, and whilst your business and solution can be serious, try and see the lighter side of the problem / challenge your prospects face. Take risks with your content – you will find that it spreads further and is more engaging (and it's much more fun to create!). Take, for example, our most recent campaign, which was centred around a report on the uses and abuses of spreadsheets. It was entitled Capitalism's Dirty Secret, and gained publicity in the national press.

Stephen Daniels, Marketing Manager at F1F9

CHAPTER 4: SOCIAL MEDIA

For some finance companies, social media is a place that is feared. However, for others, it is a place of great engagement and lead volume. Some companies even use it as a customer service channel -- Irish bank, AIB does a particularly good job of using social media for this. In fact, AIB dedicates [a whole website](#) to its social media and blogging activities.



[In a recent report](#) by research company, Mintel, it was found that 36% of consumers are comfortable with brands interacting directly with them on social channels and are significantly more likely to be satisfied with their financial services provider across a

range of factors including the branch, ATM, website and mobile app. This suggests that a proactive social media strategy is critical because the more you can get your customers to engage with you on social media, the more satisfied and loyal they are likely to be.

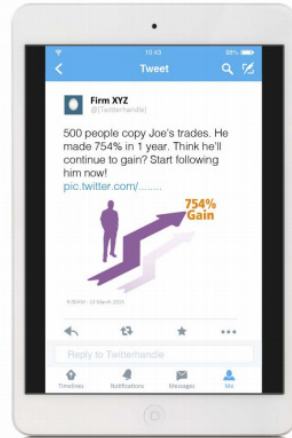
The challenge finance organisations face -- especially those in banking and investment -- is that they have to be very careful not to be seen as promoting their services over social media. Guidelines for this differ from country to country (for examples, in the UK the FCA has [guidelines on social promotion](#)), Care must also be taken to include appropriate risk warnings. This is particularly challenging due to the restriction on the lengths of some posts on social media.

The safest way to sidestep this challenge is to avoid using your social media channels to sell; use them to educate and inform. Use them to promote your helpful content (tips for saving for a wedding/holiday/car); show how your institution is helping serve the wider community through charity work; or run some competitions.

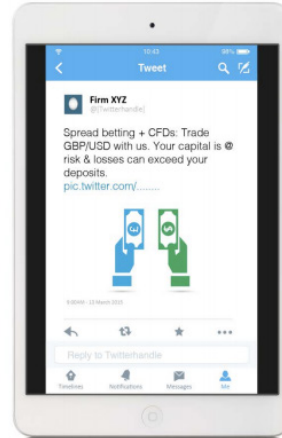
4.1 Social Media Tips for the Finance Industry

1. Avoid being over-promotional.

As mentioned earlier, some countries have guidelines for finance marketers to follow when it comes to social media promotion. Familiarise yourself with the guidelines in your own country. Take a look at the example on the next page (taken from the UK's FCA guidelines on social media promotion for the finance industry) showing the difference between a promotional and non-promotional update.



Example of a non-compliant promotional Tweet.



Example of a fair, clear and non-misleading Tweet, conveying a prominent warning within the character limitation.

2. Devise social media guidelines.

Set out strict social media guidelines that your employees can use. These need to be written in a way that is understandable by everyone. It should be very clear in terms of what employees can and cannot do on social media. This document should be covered at length during training. If your company doesn't have a style guide, you can download [this editable one](#) to get you started.

3. Develop a crisis plan.

Outline a step-by-step process that should be followed if something happens on social media that shouldn't have -- such as negative interactions or a hacked account, for example. This is sometimes referred to as an escalation guide. It should outline points of contact. Social media failures are never good for any company, but in the finance industry, they can be particularly detrimental.

4. Utilise LinkedIn Pulse

LinkedIn Pulse is a great outlet for thought leaders at your company to blog. Try to get your CEO/COO/CFO/VPs to write something once a quarter (or you can write it in their name -- see the blogging tips section for how to do this) to display thought leadership and relay that back to the blog.

5. Follow the 10-4-1 Rule.

The 10-4-1 Rule is a ratio that serves as a guideline for the right balance of content to publish in social media. For every 15 of your social media updates, 10 should be pieces of other people's content, 4 should be your own blog articles, and 1 should be a landing page. Make it a rule to follow the ratio no matter how much you post, and it will help you grow your reach, send traffic to your website and generate leads.

4.1 Best in Class

A great example of a company that's really harnessing the power of social media is UK equity crowdfunding & online co-investment platform, Growthfunders.

The marketing team at Growthfunders uses social media as part of an overall, integrated inbound marketing strategy. Since harnessing the power of social media, **the company has seen its following increase by an average of 300 followers per month.**

Growthfunders uses social media to drive traffic to its website, landing pages and blog, and -- as its following has increased -- so too has its traffic from social media. But how has Growthfunders grown its social following to a point where it's a traffic generator?

Growthfundrs has a dedicated online marketing team who handle the day-to-day social media campaigns. They also have a member of the team who focuses primarily on sending out high quality messages on all social media platforms, and interacting with new followers and relevant accounts. Finally, they have a content marketer who creates great quality content to post online, and a digital marketer who focuses on the formatting and publishing of this content.

To take one example, Growthfundrs' Twitter (see next page) is a hive of interaction and home to a variety of shared content. The team engages with their followers, share industry news, and share content such as inspirational quotes. They retweet other people's content frequently too.

What makes Growthfundrs' Twitter so good?

- 1. Hashtags:** The Growthfundrs team tweets using hashtags to contribute to and take part in online conversations, which helps to increase brand visibility.
- 2. Images:** By using images in their Tweets, Growthfundrs is increasing its leads by as much as 55%, going by [Twitter data](#).
- 3. Tagging/mentioning other users:** By tagging other Twitter users in their Tweets, they are initiating engagement with the tagged user, and the tagged user (@LondonEconomic in this case) will appreciate the visibility.
- 4. Other content:** Posting content such as inspirational quotes helps to humanise the Growthfundrs brand by giving insight into its brand personality. This is really important, as traditionally, finance companies are seen as unexciting and uninspiring.
- 5. Bio:** When writing its bio, Growthfundrs kept its target market of "entrepreneurs" and "investors" in mind. Hashtagging these terms in its bio makes the Growthfundrs Twitter profile super findable.

GrowthFunders
@growthfunders
Online Investment Platform

The investment market is evolving... get involved

TWEETS 11.5K | FOLLOWING 12.3K | FOLLOWERS 16.3K | FAVORITES 1,093 | LISTS 1

5. **GrowthFunders**
@growthfunders
Connecting #entrepreneurs with great ideas to a crowd of #investors with available funds. Become a part of the future of business finance
growthfunders.com
United Kingdom
growthfunders.com
Joined April 2012
Tweet to GrowthFunders
14 Followers you know
604 Photos and videos

1. **The LEP** @LeedsCityRegion · Mar 27
Business and education unite for #LEP young skills scheme
bqlive.co.uk/2015/03/27/bus...

2. **GrowthFunders** @growthfunders · 29m
Great idea from Move The Needle; Experiment map for lean entrepreneurs: hubs.ly/0H3JJ0 hubs.ly/0H3JQ0

3. **GrowthFunders** @growthfunders · 54m
Britain is open for business – now let's scale it up - The London Economic hubs.ly/0Ggz80 by @LondonEconomic

4. **GrowthFunders** @growthfunders · 2h
If you can dream it, you can do it. - Walt Disney

© 2015 Twitter About Help Ads info

As Growthfunders' traffic has increased from social media, so too has its leads. In fact, its year-on-year contact growth has been fuelled mainly by Twitter.

Overall, social media -- and in particular Twitter -- is a big part of Growthfunders' inbound marketing strategy. Without social media, they would not be able to achieve the reach they do, because they do not have the budget to use paid advertising to increase their visibility.



TOP TIP:

Not sure how your social media efforts are performing against industry standards?

BENCHMARK YOUR SOCIAL



TOP TIP:

Never talk solely about your business or try to be salesy online; offer advice, and educational content as well as retweeting and talking about other businesses and relevant articles and information.

Samantha Hemmingway, Digital Marketing Executive at Growthfunders.

CHAPTER 5: EMAIL

Many marketers think email is dead, and that it's an old-fashioned marketing tactic that doesn't work any more. This couldn't be further from the truth. Email is still one of the most powerful tactics in every marketer's toolkit. In the finance industry, email is often an afterthought, being used primarily for operational alerts -- such as deposit and withdrawal confirmation, policy updates, and statements -- rather than marketing communications. There is a huge opportunity here -- particularly when it comes to nurturing leads through the funnel from prospects to customers.

5.1 Email Tips for the Finance Industry

1. Run an opt-in newsletter.

Create a weekly/monthly opt-in newsletter that is full of diverse info and snippets of industry happenings. Yes, have links to your blog posts but offer readers a reason to read and share your newsletter: a joke-of-the-day, events worth going to that month, or a great guest blog your team wrote.

2. Keep track of your metrics, and test, test, test.

You should keep an eye on metrics like bounce rate, open rate, click-through rate, and so on. Test subject lines, images, length, and format, and figure out what is working best. If you want to benchmark your performance against email rates in your industry, [check out this 2014 study from Silverpop](#).

3. Maintain your lists.

Make sure to spend time segmenting your lists into segments that make sense for your industry -- that could be by customer type (personal/business), product type (current/savings account or life assurance/car insurance) and geographic location. It's important to audit these lists regularly, ensuring the list criteria are still relevant.

4. Use email to leverage other parts of your inbound marketing.

Use email to drive people to relevant blog posts, to alert them of competitions or referral schemes you're running, or to get them to share or follow you on social media. Remember email subscribers are often the most engaged in your network, so tap into them.

5. Use personalisation.

It's amazing the number of generic emails sent on a daily basis that are not personalised -- even with a name. Do not commit this crime! Regardless of what email system you're using, personalising your emails with at least a name shouldn't be difficult.

6. Be strategic.

Let's take an example from the insurance industry. If you are marketing an insurance company, make sure to communicate with people at key times -- such as when they are due to renew. Make sure that they receive a renewal reminder email a few weeks before -- just like the one on the next page from Axa insurance, which was delivered three weeks before renewal was due. This should be easily set up within an inbound marketing platform using email workflows and triggered emails.

redefining / standards

Call us on 1890 24 7 365

1 Apr 2015

Your quote is

Just € deposit and monthly
for months (APR0.00%)

[Log in to Renew >](#)

Dear [Name],

Thank you for insuring your car with us for the past year.

We will **automatically renew** your car insurance policy on 22 Apr 2015.

Your renewal for this year is [Amount] - this includes a special 10% online discount.

Your nine-month payment plan

Deposit amount	[Amount]
Balance	[Amount]
Interest charge 17.04%	[Amount]

Your deposit will be collected from your account within seven days of your renewal.

Monthly instalment amount	[Amount]
Total due	[Amount]

Date we will collect first instalment: [Date]

Date we will collect last instalment: [Date]

What to do next?
To review your details or make changes to your policy, simply log into your online [MyAXA](#) account.

[Log in to Renew >](#)

[Forgotten password?](#)

Thank you for insuring with us and we hope to look after your insurance needs for the year ahead.

Kind regards,

Antoinette McDonald,
Online Business Department,
AXA Insurance

Reasons to renew with AXA

- Rewards for safe driving
- 24 hour claims assistance line
- 42 branches across Ireland
- AXA Plus our Customer Loyalty Programme
- A quality & reliable service

Secure Server
Protected by...
SSL

This strategy is not just for current customers, however. When searching for car insurance, people are likely to consider a number of different vendors, and are likely to give their details to more than one provider for a quote. Insurance is something that is typically searched for on a yearly basis, meaning the sale you may have lost out on one year, becomes a lead again the next. This means there an opportunity to send an email like the email on the next page in an attempt to win the sale

its4women.ie
Online Insurance For Women

1890 886 227

Date: 30/03/2015

Dear [Name],

Thank you for getting a quotation from us last year. Unfortunately on that occasion we may not have been competitive for your circumstances. According to our records your policy is due for renewal on 10/04/2015 and to get you started we have included a voucher code for a € 35 discount, see below for further details.

We thank you for using www.its4women.ie in the past and we hope we can welcome you as a new customer.

Yours faithfully

its4women.ie

www.its4women.ie

Voucher **€ 35**

To receive €35 off your online quote enter code:

Discount

2157

Get a Quote and Get an Extra €35 Discount !!!!

We have saved your details from last year. All you have to do is click on the button below and check that your details are still correct. If anything has changed over the past 12 months just simply update your information with the new details.

At the quote page under "Voucher Code" enter the code opposite and hit recalculate and you will receive a further €35 discount.

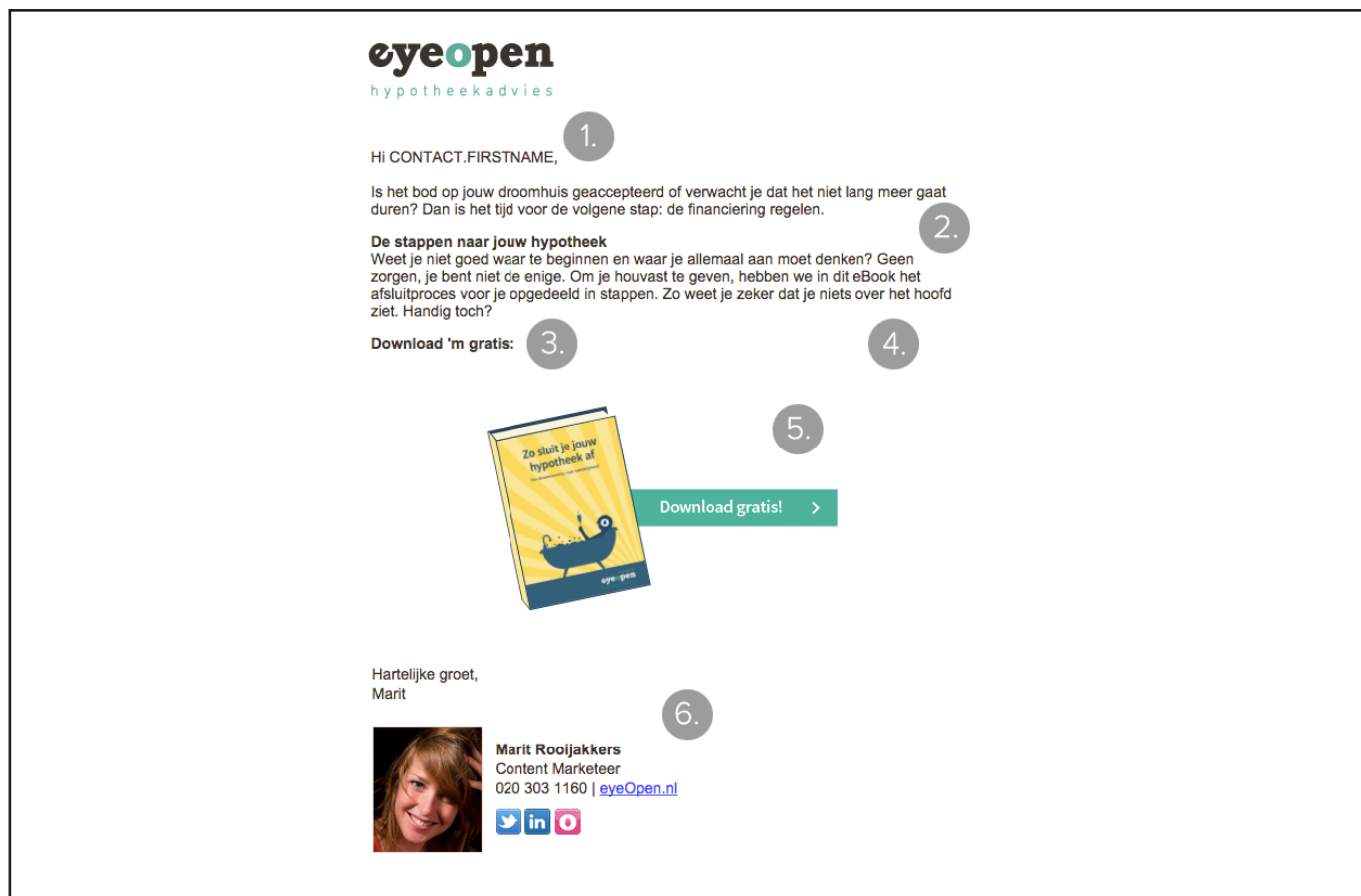
[Click Here For Your Quote](#)

This strategy is not just relevant to insurance marketers. It can be rolled out across inbound marketing strategies for banking and investment companies too.

5.2 Best in Class

The team at Dutch online mortgage advice company eyeOpen spent its initial inbound marketing journey focusing on developing a better understanding of its website visitors and building its website traffic. It then set about trying to convert more website visitors by experimenting with calls-to-action. Now, the company is working towards creating stronger emails, and integrating workflows into its email marketing in order to take its lead nurturing to the next level.

The team at eyeOpen is doing a great job of building their emails, and is following advised best practices. Let's take a look at one of its emails.



So what makes this email so good?

- 1.** The email is **personalised**, and addresses recipients by their first name.
- 2.** At an early stage, the email **makes it clear what challenge the offer is addressing**. In this case, the email is appealing to people who have had a bid accepted or nearly accepted on a new home, and they need to arrange their financing.
- 3.** The email uses **actionable language** to direct the recipient to desired action -- in this case, "Download for free".

4. Short emails with one clear aim perform the best. Note how **this email is kept brief (under 200 words)**, and does not overwhelm the recipient with irrelevant content.
5. The email includes a **prominent CTA, which is located above the fold**. The call-to-action is specific to the offer, showing the cover of the actual ebook that's on offer.
6. The **email signature** in this example gives the email a more personable, human feel.

Overall, this email is aesthetically pleasing to the eye and is very digestible. eyeOpen uses this style of email to send content to its database. Emails are segmented based on the lifecycle of the lead. This style of email is also used to follow up with webinar attendees after airing, offering them a recording of the webinar and a related offer. Even though eyeOpen is in its early days with this kind of email marketing, the results have been promising. Typically, these emails receive an above-average open rate of around 75%, and click through rates of around 45-50% (based on opened emails).



TOP TIP:

As we're a small team, we found building our inbound marketing activities in stages worked well for us. We got to know the specific painpoints in the customer journey of home buyers (by doing interviews, for example) and creating a base of relevant content (blogs, eBooks and infographics). This helped to increase our traffic levels by 200% in six months. We then concentrated on converting visitors to leads with appealing CTAs. After almost tripling our lead flow, we are focusing on nurturing our leads with email marketing, and so far so good!

Kione Smits, Content Marketeer at EyeOpen

CHAPTER 6: CTAS

A call-to-action (usually abbreviated to CTA) is an image or line of text that prompts website visitors, leads, and customers to take action. It is, quite literally, a “call” to take an “action.”

The action you want people to take could be anything: download an ebook, sign up for a webinar, get a coupon, attend an event, etc. A CTA can be placed anywhere in your marketing -- on your website, in an ebook, in an email, or even at the end of a blog post.

Calls-to-action (CTAs) are an essential part of all inbound strategies, and they fit into every stage of the inbound marketing process. Firstly, they represent gateways to your landing pages, and help to convert visitors to leads. Furthermore, by using CTAs tailored specifically to specific persona types at each stage of the process, they can be instrumental in closing leads to customers. CTAs can also help to delight customers by directing them to offers that speak to their unique needs.



TOP TIP:

Create your own CTAs in seconds using these customisable CTA templates.

[CREATE YOUR CTAS](#)

6.1 CTA Tips for the Finance Industry

1. Avoid being overly promotional.

Rather than including the copy “Click here to learn how to guarantee a 10% return on your first investment” in your CTA, you should opt for something for general such as “The beginner’s guide to first investments”. This will keep you in line with any legal guidelines regarding promotion that you need to follow as a finance marketer.

2. Experiment with different kinds of CTAs.

There is a ton of different types of CTAs to choose from -- static, slide-in and even pop-ups. Check out [this blog post](#) to learn how to create a slide-in CTA for your blog.

3. Address your personas’ challenges in your CTAs.

Your CTA should be really focused on your personas’ challenges, and direct the clicker to exactly where it says it will. Consider this CTA from the HubSpot blog below -- it answers marketers’ challenges associated with creating effective CTAs.



Free Ebook: 101 Examples of Effective Calls-to-Action

See how real companies are putting marketing best practices to work with these stellar CTA designs.

[Download Ebook Now](#)

4. Include images in your CTAs.

Including images in your CTAs can increase your conversion rate. Neil Patel found that including images in his CTAs resulted in [a 28% increase in conversion rate](#). Include a picture of the cover of the actual ebook your CTA is directing to on the CTA (as in previous example). This will draw attention to it and make it more desirable to click.

5. Align your messaging.

Make sure that the messaging from your CTA follows through from the CTA to the landing page. This ensures fluidity in the user's journey. Note how the title and cover images from the CTA (on the previous page) are carried through to the landing page below.

Free Guide: 101 Examples of Effective Calls-to-Action

[See how you can encourage your website visitors to convert.](#)

Enhancing the look and feel of your calls-to-action is a great way to get more leads from your website. But reading about best practices isn't the same as *seeing* them.

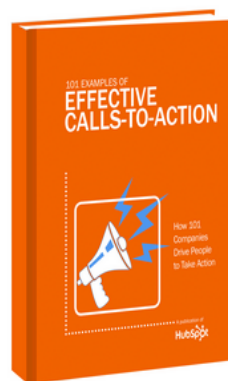
That's why we compiled 101 call-to-action examples that will show you how real companies have created effective calls-to-actions for their sites.

Find out what works and how you can implement these tactics in your own marketing. These examples will inspire you, foster your creativity, and prepare you to create some stellar calls-to-action.

You will learn how to:

- ✓ Make good use of text and video.
- ✓ Facilitate segmentation of buyer personas.
- ✓ Reduce visitors' anxiety and offer incentives for conversion.
- ✓ Incorporate smart design decisions.

and more... after all, there are 101 of them!



See These Examples For Free:

First Name *

Last Name *

Email (privacy policy) *

Website URL *

What is your role? *

Subscribe to HubSpot's marketing blog

Job Title *
 Please enter your complete job title. For example, "Director of Demand Generation".

DOWNLOAD NOW

CTAs that work for one company won't necessarily work for you. It's important to run testing on an ongoing basis -- test colour, size, placement, images, and language. If you have access to A/B testing software, use it! It will make your testing painless and effective.

6.2 Best in Class

Let's look at some examples of great CTAs by some of the companies already showcased in this ebook.

1. F1F9

F1F9 has some really attractive CTAs on its blog. Earlier in this ebook, we took a deep dive into F1F9's 31 day financial modelling course. We looked at the landing page, blog posts and emails associated with it. We also highlighted the CTA placement at the bottom of the blog. Notice how the CTA is clear, concise and tells the visitor exactly what they are going to get if they click through. Even though this CTA does not include an image, it communicates the message very clearly.



This is not the only CTA used to raise awareness about the course throughout the site. Here is an example of another (bigger) one than can be found on the right nav bar on

the blog. Trying out different CTA placements on your site is smart, as is playing around with the messaging and content.



31 DAYS TO BETTER FINANCIAL MODELLING

START YOUR FREE COURSE NOW

In around 10 minutes per day for 1 month, this FREE online financial modelling course will teach you the basics of the FAST modelling standard, and some practical and highly effective modelling skills.

SIGN UP HERE

2. eyeOpen

With traffic levels to its site increasing, the team at eyeOpen wanted to shift its focus towards converting visitors to leads. They started testing static and slide-in CTAs in order to make more visitors download their content. Since then, they have tried several new designs, appealing buttons and different copy in order to catch the eye of their visitors.

eyeOpen started out with some simplified generic CTAs. However, after deciding to test including real covers of their ebooks in their CTAs and combining slide-in CTAs with static ones in blogs, **monthly lead flow increased by 196% in six months**. Examples of these CTAs are shown on the next page.

“Bezichtig jouw droomwoning”

Waar moet je tijdens een bezichtiging op letten? Met dit eBook zie je niets over het hoofd en weet je straks of deze woning echt jouw droomwoning is.



eBook

Download gratis! >

Generic simplified CTA



“Bezichtig jouw droomwoning”

Waar moet je tijdens een bezichtiging op letten? Met dit eBook zie je niets over het hoofd en weet je straks of deze woning echt jouw droomwoning is.

Download gratis! >

CTA designed specifically for this ebook -- this kind of CTA delivered an increase in leads of 196%

CHAPTER 7: CONCLUSION

Now that you are familiar with the basic concepts associated with inbound marketing, your next step is to start!

If you haven't already, start a blog. Even if you can only blog once per week, try it. If you have the resources, create some long-form content and build some landing pages. Remember that small steps are all you need to get started. You should have all the information you need in this ebook to give you a good start.

NEED MORE HELP TO GET STARTED?



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CONSULTATION
TAILORED TO
THE FINANCE INDUSTRY

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