



# **THE FINANCIAL ADVISOR'S CRASH COURSE IN GENERATING LEADS**

# AUTHOR



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# INTRODUCTION



Make your website the ultimate lead generating machine! In this lead generation guidebook, written just for financial professionals like you, you'll learn:

- What online optimization you need to have in place to begin collecting leads
- The essential lead generation strategies to put in motion
- Additional tried and tested lead generation tips you can implement to get your website working for you

**Level: Intermediate**

# 1

# THE FOUNDATION

# WHAT IS A LEAD?



Lead generation can be the cornerstone of your web marketing strategy. After all it is literally where the bread and butter of your business comes from.

Before we dive into generating quality leads online, let's define what a lead is:

“

LEAD: /Leed/:

a lead, in marketing context, is a potential sales contact; an individual or organization that expresses interest in your service offerings.

”

# MORE ON LEADS



## **What A Lead Is:**

A lead is someone who has shown interest in your firm in one way or another. In other words, this is a unique opportunity to share your story and demonstrate the value of your firm.

## **What A Lead Is Not:**

A lead is not a one-size-fits-all, automatic sale. While a marketing qualified lead has shown interest in your firm, it doesn't mean that they're ready to be sold. Gathering information is the first step and leads generated from your website is an indication that someone is learning about who you are and how your service matches up to their needs. A lead is someone who has shown interest in your firm in one way or another. In other words, this is a unique opportunity to share your story and demonstrate the value of your firm.

Now that you have a solid understanding of what a lead is, we're going to look into the why. As in why you have to generate leads online, and why it is crucial to your business's success.

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# WHY GENERATE LEADS ONLINE?



Recently on the Advisor Websites blog, we polled readers to find out how they typically generate leads. Overwhelmingly (and unsurprisingly), we found that referrals are still the number one lead source for financial advisors.

An even more eye-opening revelation, is that 17% of those polled are still primarily cold calling to generate new business. In this book we hope to show how with a little time and effort, you can make your advisor website work for you. You can continually generate leads, and grow your online presence.

**64%**  
of financial advisors use  
referrals as their primary  
source of lead  
generation



# ONLINE LEAD GENERATION STATISTICS



Using the 9 strategies laid out in this ebook, you can begin to optimize and streamline your lead generation process. Essentially, generating leads online can yield a huge return on your investment of time and money.

If you still need convincing, check out these mind blowing statistics. The numbers don't lie: generating leads online is the most effective way to grow your business.

**61%**

inbound leads cost  
61% less than  
outbound leads!

**93%**

of companies using  
inbound marketing  
increase their lead  
generation.

**42%**

of companies using  
inbound marketing  
increase their lead-  
to-sale conversion  
rate



We know that referrals are an important lead generation tool. So is your online presence.

Let's put this into perspective: if you move across the country, and need a new dentist, you ask for referrals from your friends, coworkers, etc. Once they've given you a referral, what is the first thing you go? You Google them.

**It's kind of a new fact of life. The first thing a referral will do is Google your name or the name of your firm and seek information about you, before they pick up the phone** (almost 90% of Americans do this today). If they don't like what they see (or, if they can't find any information about you at all) you can't really expect a call.

**Action step:** Google yourself! What shows up on the results page? Try and view it from the perspective of a referral. Do the results help create a positive first impression? What if your website actually helps you get more referrals?

# 2

# THE FOUNDATION

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# WEB STRATEGY



In order to generate high quality leads online it's vital to maintain a strong web presence that attracts your ideal client.

A lead generating website evokes trust and professionalism from it's visitors. The site creates a positive first impression of the firm. And before that? First, people have to visit your website.

Financial advisor websites that generate leads all have a few commonalities. Successful websites do three things exceptionally well:

- 1) Easy to find
- 2) Easy to navigate
- 3) Easy to use

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## EASY TO FIND



A great website isn't that great if no one uses it. Step one for building a lead generating website? Getting traffic.

There's a lot of technical chatter that goes into creating a website that's ranks highly in search engines like Google, but what's the big picture? SEO is all about making sure the people who are looking for you online, are finding you.

When a referral searches for you online, they'll likely type in your name or the name of your firm.

Suppose, however, someone in your city or town is looking for an advisor, but they've never heard of you. They may use a search phrase that's much more vague, like "financial advisor in Atlanta." Websites that rank highly for more generic search phrases are more likely to receive traffic and generate leads. Try inputting other key search phrases into Google and see how your website ranks.

# EASY TO NAVIGATE



Most website visitors will spend less than 15 seconds searching for the information they're looking for on a website. Nine times out of 10, web users will navigate away from the website and they won't come back if they can't find the information they're looking for.

The traffic to your website can be broken down into two general groups: prospects (including referrals), and your existing clients. Consider the different types of information each group will be looking for.

Think about your own website and whether it is easy to navigate for prospects and clients:

- 1) Is the navigation in a consistent location across every page of your website?
- 2) Are the titles of your pages clear and easy to understand?
- 3) Does your website follow the "3-click-rule"?

**The 3-click-rule allows visitors to access any page of your website in 3 clicks or less.**

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# EASY TO USE



Web usability expert, Steve Krug, captured the essence of what a web experience should be like for users in his book, “Don’t Make Me Think.” Krug explains that the best and most used websites are really easy to use.

Successful websites are well thought out and consider how users will interact. Here are a few of Krug’s guidelines for creating a user-friendly website:

- 1) Clear and relevant calls to action
- 2) Easy to scan information
- 3) Thoughtful use of imagery
- 4) Clean design
- 5) Organized, and clear appearance

# 3

# THE PROCESS



# IDENTIFY THE OFFER



Website visitors generally don't mind exchanging their contact information if they perceive that they're getting something worthwhile in return.

What can you offer prospects that will peak their interest and add value to their busy lives? Usually the offer is a piece of content that adds value like a blog article, white paper, podcast, guide book, etc.

Get inside the mind of your ideal client (your target audience) and consider what information they're looking for. We suggest starting this process by building your client personas.

70%

of consumers say they prefer to learn about a company through a piece of content

# CONTENT



What type of content will your web audience be interested in? In the last section of this ebook, we'll give you 6 ideas for actually generating leads online – for now let's focus on how to create meaningful content for you web visitors.

## Expert Tip:

Instead of taking a guess at what type of content your website visitors are interested in, use real data. Change up your content offers each month for three months and record how many leads are generated each month.

## Questions & Examples:

- 1) What pain points can you address? Top 3 challenges to a happy retirement
- 2) What questions can you answer? How much money will you need to retire?
- 3) What resources & tools can you offer? Retirement calculators, worksheets or templates

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# ASK VISITORS TO TAKE ACTION



Calls to Action are exactly what the name implies: These little buttons direct your audience towards taking the next logical step.

What is it you'd like your audience to do next? Some popular CTAs we find on financial advisor websites are "Schedule a Meeting," or "Subscribe to My Newsletter," but when it comes down to it, you can ask your visitors to do anything. The bottom line is that you want to make it really, really easy for your web visitors to do whatever it is you want them to do.

A great CTA enhances your website in a couple of tremendous ways. First, it makes your website interactive for users. It gets your audience involved. In addition, CTAs often result in a lot of great information about who's visiting your website.

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# CREATE THE EXCHANGE



Lead generation happens when a prospect exchanges their contact information for something valuable. Usually this happens on a form or landing page.

So, what is a landing page? A landing page, sometimes known as a “lead capture page” or a “form page,” is a single web page that appears in response to clicking on an optimized search result from a search engine like Google, or an online advertisement.

Conversions happen on landing pages – it’s the place where website visitors exchange their contact information for a piece of worthwhile content.

Remember when you downloaded this ebook? First you were directed to a landing page where you completed a 4-field form where we collected simple information like your name and email address.

The best landing pages are very simple and unobtrusive. Let’s look at other characteristics of successful landing pages.

# CREATE THE EXCHANGE (PART 2)



## Keep It Short and Fun

Landing pages are made up of three primary items: an enticing graphic, a short explanation of the offer and, most importantly, a form. Definitely keep the graphic fun and relevant (also, keep it consistent with the image that's used on the call-to-action). Make sure the image that you choose relates to your audience.

## Be Consistent

Basically, don't exaggerate. Make sure your landing page offers what your call-to-action advertises. Try to use some of the same wording in the call-to-action that describes the offer and its subject matter. Both of these components should be present on your landing page, too.

## Remove Navigation

One more way to prevent visitors from abandoning your landing page is to remove all of the navigation along with any other calls-to-action on the page. Removing your navigation and all other calls-to-action on your landing page is the quickest way to keep those visitors on your landing page long enough to fill out your form.



# FORMS



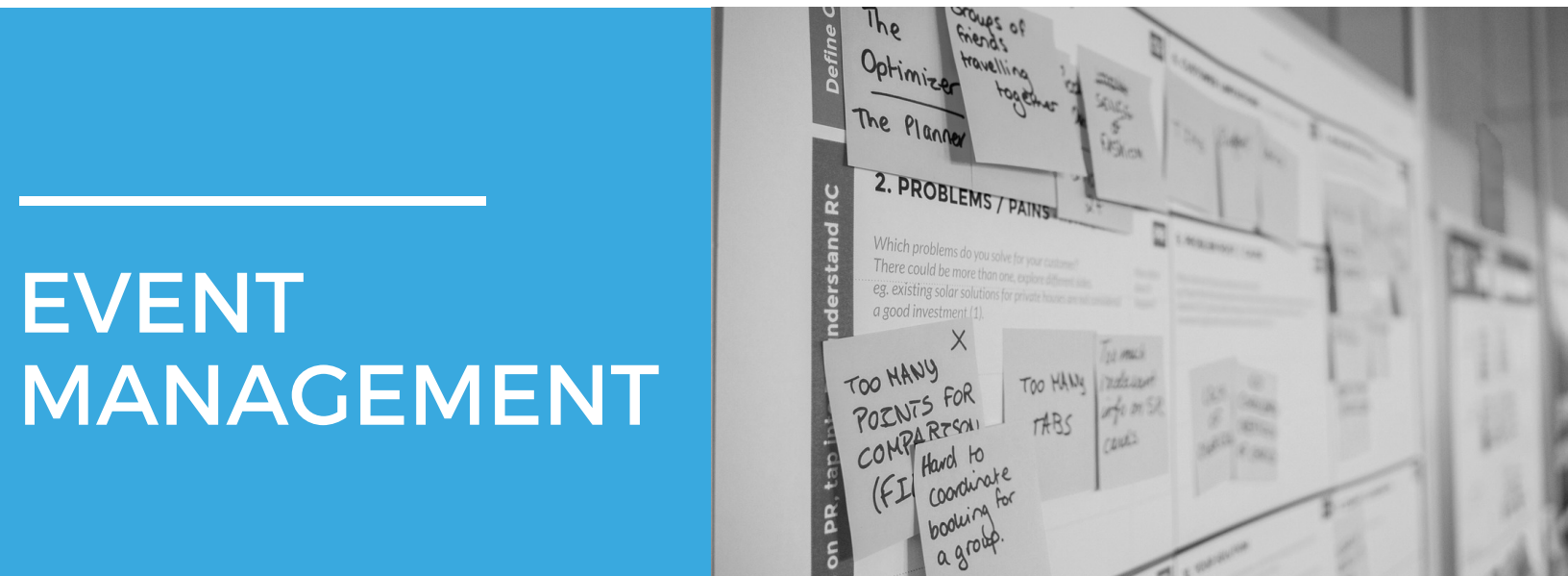
## Expert Tip:

Only ask for the information you need on the form that is required for visitors to fill out. Essentially, the more information that's required to download the offer, the less likely people are going to do it.

Asking for fields like name, phone number and email address are certainly acceptable –try not to make people feel as if they're signing their life away to download the offer.

# 4

# LEAD GENERATION IN ACTION



Many advisors are already hosting events to reconnect with existing clients, meet referrals, and meet new prospects. Promoting and managing your event using your website is one more way to save time, money and tons of stress for you and your admin team. Managing an event online allows you to invite your audience and manage their RSVPs right from your website.

Today, we're seeing advisors host events virtually via webinar. Like blogging and other content marketing initiatives, one huge perk of hosting a webinar is the ability to establish yourself as an expert in financial services.

Leading a discussion and providing tips and resources to a live audience is a way to build credibility with your audience in a genuine and authentic manner.

Being seen as an expert in one area of the financial profession will improve your relationships with existing clients and prospects, building a stronger bond of trust between you. Advisors are beginning to host virtual events, also known as webinars



# EVENT MANAGEMENT (PART 2)



Leads are generated when your target audience registers for the event. They'll be required to complete a form that collects (at the very least) their full name and email address. The more narrow the topic of the presentation, the more qualified your participants will be. Hosting webinars is a great way to collect and grow email lists for future prospecting.

Because the attendees are interested in the information you are presenting, and already engaging with some of your content, webinars have been shown to have higher conversion rates than other forms of web marketing.

There are many virtual event platforms - here are three options of varying price:

- 1) **Any Meeting**
- 2) **Go To Webinar**
- 3) **Instant Teleseminar**

## Expert Tip:

Don't forget to promote your webinar or event! Utilize your newsletter, social media channels and website in order to get a great audience.

# BLOG



## 1. Fresh content

Both humans and search engines love fresh content. Websites with a blog generate more traffic and leads. Because search engines like Google really love the fresh and original content that is published on a blog, websites with a blog regularly rank higher on a search results page. What does that mean for you as an advisor?

Basically, blogging is a great tool to help the people who are looking for you online (ie, potential clients) find you. Blogging adds pages and content to your website. **By blogging you are growing your website and attract more attention from google.**

Inevitably if you are ranked higher in search engine results, the right people will be able to find you. And as we know, the better your SEO is, the better your traffic will be. Some quick wins from your blog can be from optimizing your posts with relevant long-tail keywords in your industry. This way the people that are looking for you (high quality leads) can actually find you.

# BLOG (PART 2)



## 2. Establish credibility

Financial blogging provides a platform for you to position yourself as an expert in the industry. Besides the technical side of SEO and creating fresh content for your website, blogging allows financial advisors to connect with their clients and prospects and build a unique rapport that is incredibly cost and time efficient.

## 3. Provide Value

It's not surprising that consumers report that they would rather read an informative article about a topic that interests them, than a sales pitch describing the services you provide. It's all about building trust and relationships. Use your blog as a platform where you answer questions that you get asked all the time.

**57% of companies that blog have acquired new paying clients from their blog.**

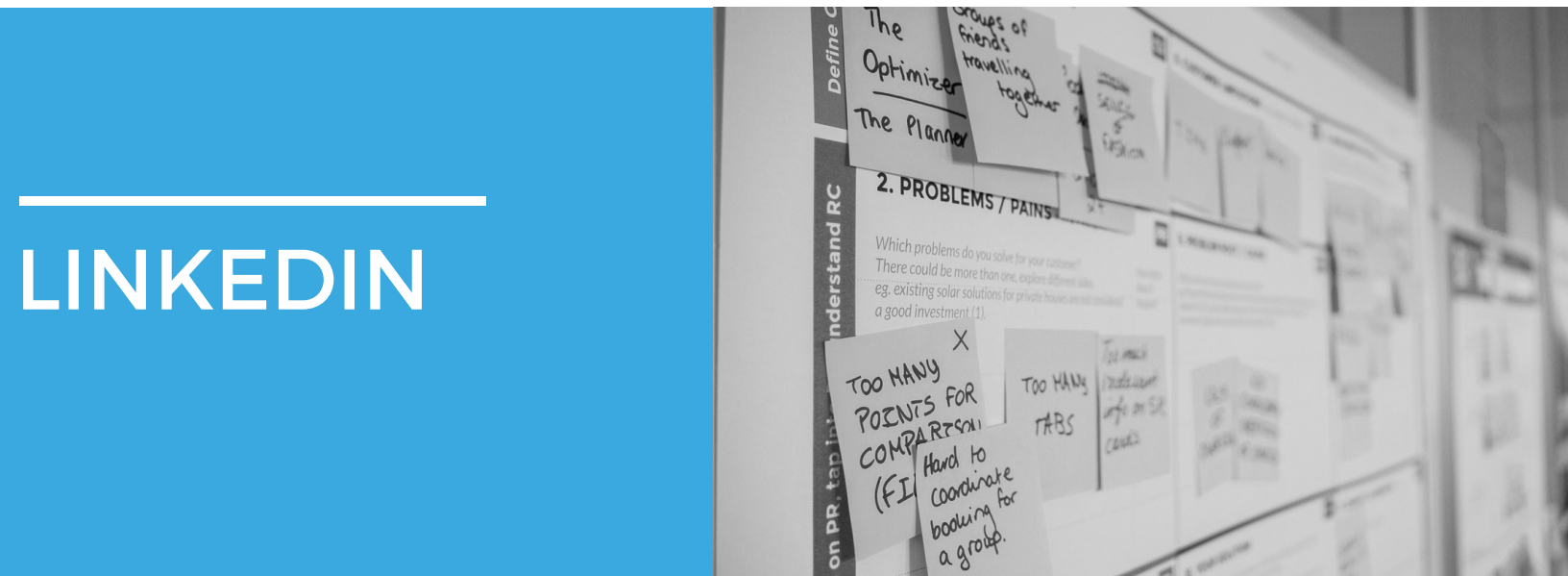
# SOCIAL MEDIA



LinkedIn, Twitter and Facebook are the three social media giants you should focus on. However, in this book we're going to take a deeper look at LinkedIn and its potential to generate leads, and grow your client base as a financial professional.

LinkedIn is a financial advisors best friend, and it can be so much more than just a digital resume full of your skills and experience. Harness the power of LinkedIn and use it unlike any other social network. Showcase your Digital Resume to build credibility online.

Make sure when you're found online your profile is optimized to reflect who you really are. Don't be shy: showcase your achievements, your education and your skills. Highlight additional qualities that make you a compelling professional, such as charity work, and interests. People like people who they share common interests with, and the same can be said for clients looking for a financial advisor. Walk the fine line between professional, and person.



## Use LinkedIn to Generate Leads

If you've perfected your LinkedIn profile and are building a solid online presence, you can take the next step in acquiring new clients. Targeted ads have great potential to grow your business. in a way that traditional outbound marketing couldn't possibly achieve.

### Three tips for creating your LinkedIn Ads:

1. Set a budget
2. Craft a compelling ad that invites the user to learn more
3. Collect the leads for you or your sales team to follow up with'

**87% of B2B marketers are using social media to distribute content**



# E-BOOK & WHITEPAPER



One thing we can't emphasize enough, is the importance of providing 'Value' in your content. Web consumers are savvier than ever. Studies show that consumers are less interested in getting sold to, but by providing information to a targeted audience you can put your name out and generate higher quality leads at the same time.

White papers or online brochures can be one of the best places to gather information from your web traffic. Create a one page informative white paper on a topic you are highly knowledgeable on.

As we previously mentioned, a landing page is one of the most crucial places to convert traffic to leads. By placing your white paper or resource behind a form, your traffic will trade an important piece of their information, their phone number or email, in exchange for the information you offer.

# VIDEOS



Content marketing is a great way to begin the conversation with your clients. Although it may take a little extra time (at first), **content marketing has been shown to generate 3 times more leads than traditional marketing.**

Video creation goes one step further than blogging alone; videos add a level of engagement nearly impossible to get with text based content. **One minute of video is equal to 1.8 million words and 65% of executives visit the marketer's website after viewing a video.**

One question advisors ask most frequently about video content creation is how to come up with ideas to discuss in your videos, which will add value for your clients and prospects.

# VIDEOS (PART 2)



## 1. Answer FAQs

How often do you answer questions like these: “How risky is the stock market these days?” or “What’s a fiduciary, anyway?”

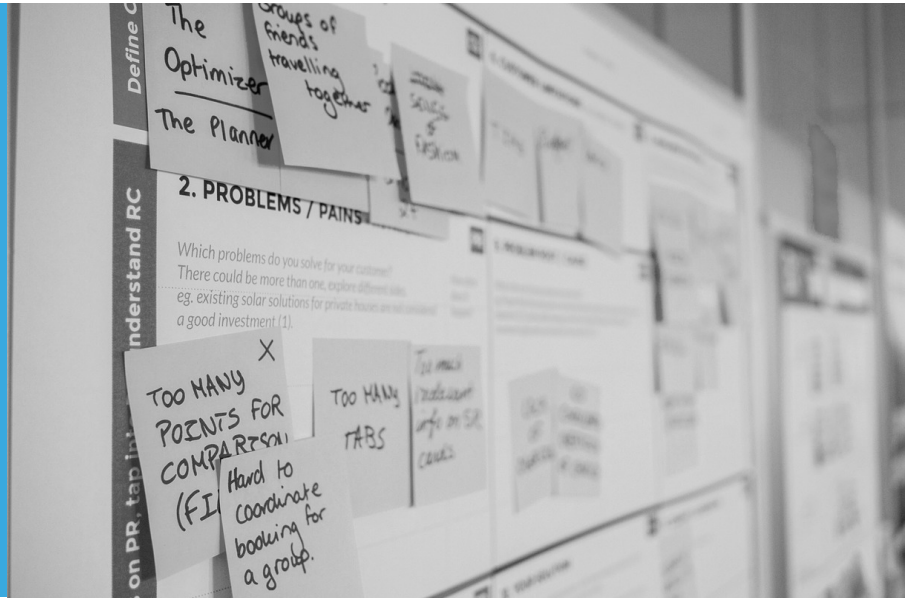
We suggest scrolling through your inbox and making a list of questions you receive from clients, prospects, friends, etc. These types of questions create the perfect platform for a 2-3 minute video that provides value and is helpful. It also helps you build credibility and authority with viewers.

## 2. Share tips & success stories

People are always looking for (free) information on how to manage money or save for college/ retirement/emergencies - you name it! A short video clip explaining three ways to save for college could be a perfect place to get started.



# VIDEOS (PART 3)



## 3. Interview people

Getting a fresh take on current events or gathering the opinions of your colleagues is refreshing for viewers and requires little effort on your end. Come up with 5-10 simple, open-ended questions and let your guest explain.

No matter how you decide to come up with ideas for video content, one factor should always be a top priority: make sure your video adds value to your target prospects and ideally helps them solve a problem.

Another concern we hear pretty often is coming up with enough content for a lengthy video. In fact, viewers will only stay tuned in for a few minutes, tops- so keep it short! Two to three minutes is plenty of time to educate viewers without boring them.

# PERSONALISED CONTENT



Digital marketing is all about creating an experience that your ideal client can draw value from. One trend that we are seeing more often in financial marketing is technology that allows advisors the capability to offer a very personalized experience.

This can be done in a number of ways like surveys, quizzes, etc. but there's one tech firm that's hitting home runs by helping advisors generate leads online: Riskalyze. Riskalyze offers advisor website visitors a chance to assess their current financial risk factor by completing a questionnaire right from the website.

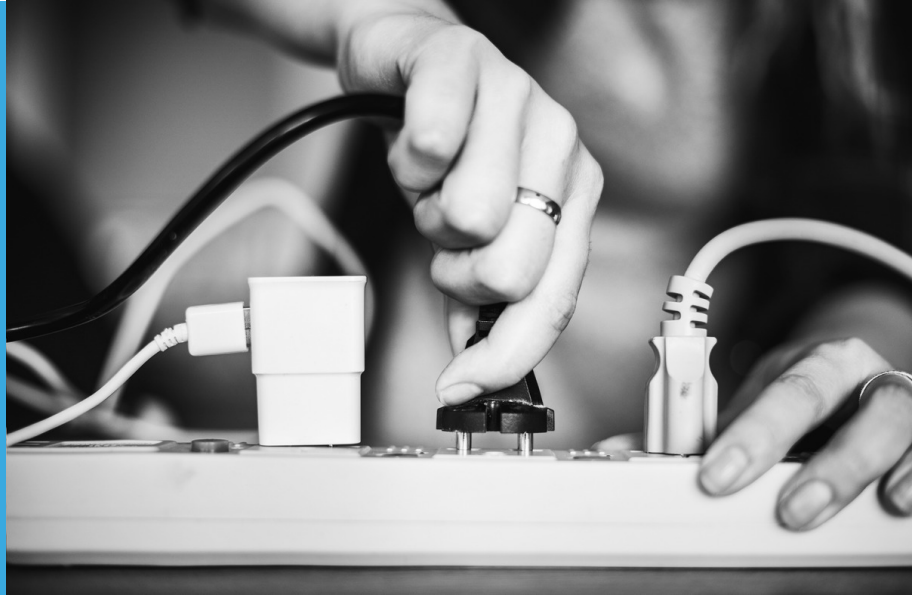
So... how are leads generated? When an investor completes the questionnaire they are putting a lot of trust in the advisor.

And, where's the value for prospects? Investors want to know how they stand in terms of risk and, in the case of Riskalyze, the questionnaire results are based on scientific calculations – not guesswork.

# 5

## THE NEXT STEP

# CONCLUSION



So, what happens next? Once you begin collecting leads online, a well-thought out plan is in order.

Marketers call this process lead nurturing. This is an ongoing communication process that involves consistent and meaningful touches.

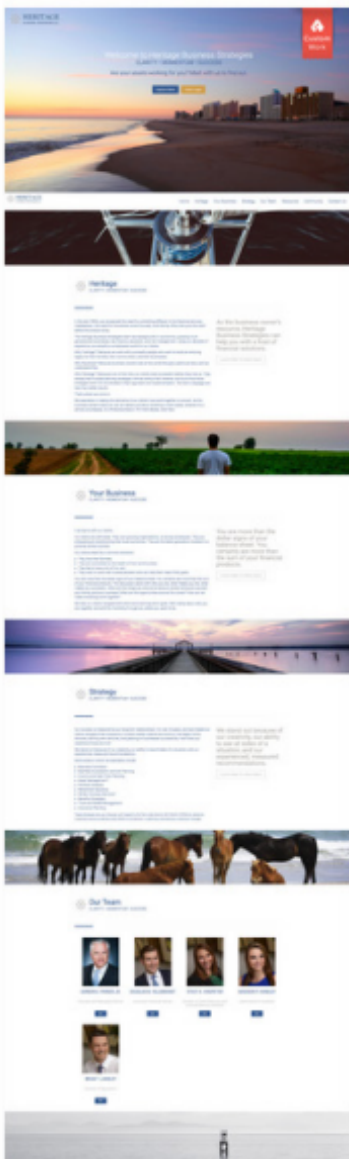
From picking up the phone to setting up an automated drip campaign, lead nurturing is an important part of earning new business online.

**Check out this helpful resource on nurturing leads generated from your website and keep up to date with our blog for more!**



Before you go, make sure you schedule a demo with one of our web experts!

You'll be amazed to see what you're missing out on!



Book your demo





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