

THE **KALLI**COLLECTIVE_{LLC}

DIGITAL MARKETING MANUAL

for financial advisors

Kalli Collective Gives Your Brand a Voice



Kalli Collective is a digital marketing agency specializing in working with the financial service industry. Our mission is to connect and grow - our team, ourselves, and you! We are dedicated to staying at the forefront of digital marketing, building on the legacy you've created to elevate your brand above the rest.

We believe that the best brands are built on trust, expertise, and a deep understanding of the specific needs of the customer. Our leaders have more than a decade of experience in the financial industry and have carefully curated a team with the perfect balance of creativity and strategic thinking. We are not for the faint of heart or those content with the status quo. Our team of creators, innovators, storytellers, and problem solvers is equipped and ready to give your brand a voice.

We built this manual as a starting place for advisors who are ready to take control of their marketing and give their brand a voice. We reference its tenants often in our communications with our clients. Whether you're just starting out or looking for a refresher this manual was created for you.

- *The KC Team*

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The Basics

Target Audience

Want to know the key to successful marketing? Cater to your target audience.

Catering to your audience doesn't mean delivering food to their doors. It means that everything you are producing, from your website to your social media posts, is created with your target audience in mind. What are their needs? What are their preferences? What are their fears? What gives them joy? How do they like to receive information? Where are they spending their time?

Everything in this manual depends on your target audience. So before you move on, you better make sure you know who they are!

HOW TO DETERMINE YOUR TARGET AUDIENCE

Most advisors have multiple target audiences. That's why you may have several campaigns about the same topic: each one is aimed at a different target audience (we'll discuss marketing campaigns more on page 15).

While your audience is anyone who receives your message, your **target** audience is the intended recipient, and they are largely determined by your business goals. If your goal is to receive referrals from estate attorneys and accountants then you have four target audiences: 1) estate attorneys 2) accountants 3) referrals from estate attorneys 4) referrals from accountants.

If your goal is to create business exit plans for small business owners then your target audience, you guessed it, is small business owners. You can see how each business goal will have its own target audience.



WAIT... WHAT IS A TARGET AUDIENCE?

The intended recipients of your message. They may be clients, prospects, or referral partners.

KNOW YOUR WIN AND THE CONVERSIONS NEEDED TO ACCOMPLISH YOUR WIN

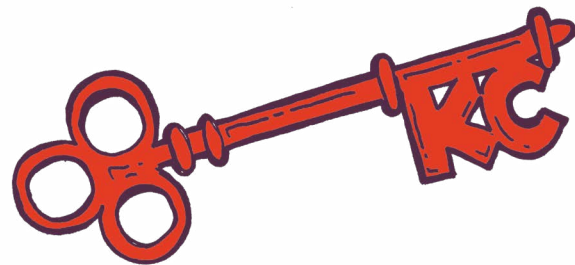
Generalized, vague goals will not help you. You can't decipher your target audience or plan your marketing strategy from, "I want more clients." You have to break down what action you want new clients to take, who would be likely to take that action, and who you want to take that action out of the candidates. You may want to create more retirement plans, but do you want to create retirement plans for both the struggling musician and the CEO of a multi-billion dollar company?

WHAT YOU NEED TO KNOW ABOUT YOUR TARGET AUDIENCE

After you've created your target audience list, think about each group one at a time. Ask yourself the following questions about each group:

- What's their average age?
- What's their marital status?
- Do they have children under 18? Do they have grandchildren under 18?
- Do they have adult children?
- What is important to them?
- Why do they want what you are selling? Why do they need it?
- What are the pain points that your product or service serves as a solution to?
- What emotions drive their decision in working with you?
- Where do they spend their time?
- What hobbies do they share?
- What brings them fear? What brings them joy?

Save this list and refer back to it throughout this manual and as you craft your brand and messaging to your audience in the future.



Remember the key to marketing success is catering to your audience.

Brand Identity

A brand identity is essential if you want your marketing to be consistent, clear, recognized, and a true representation of your business. A brand identity is how you represent yourself to the public. As you develop your brand, it is crucial to cater to your audience.

Don't stop at a name and a logo. A brand, in essence, is how you operate. A brand identity is putting a face on your operations. It includes everything from how you answer the phone to how you sign your emails. Successful brands intentionally craft each step.

HOW TO DEVELOP YOUR BRAND

Know thyself first. Just like your target audience is defined by your business goals, so is your brand. What are your values? What is your mission? Who do you work with? These should always be represented in your brand.

While your brand identity exists in everything you do as a business and should be intentionally crafted, start with the following:

- Mission statement
- Name, logo, tagline
- Words that describe how you want to be portrayed
- The reputation you want to have
- A standard biography/about
- Colors & fonts
- Relevant keywords
- Topics to focus on

Want to dig in deeper? Become a Savvy Advisor at KalliCollective.com and get access to the "Craft Your Brand" video course: KalliCollective.com/savvyadvisor

The Sales Funnel

You've outlined your tangible business goals and the actions you want your target audience to take to meet those goals. Now let's talk about the steps they take to get there, the sales funnel.

We liken the sales funnel to romantic relationships. We've broken this journey into 4 phases as pictured on the next page and detailed below.

In the first phase of a romantic relationship, you introduce yourself to people who might fit the bill of your "perfect partner." You get your name out there. You spend time in places you think your ideal mate would be. You even visit a few places that you doubt they would be at, but just in case, you make an appearance every now and then.

Once you've found someone you're interested in, if there's mutual interest, you exchange contact information so you can get to know each other better.

You decide that you're definitely interested in pursuing a lasting relationship. You show off all your best traits. You cook them dinner and even clean the dishes after too.

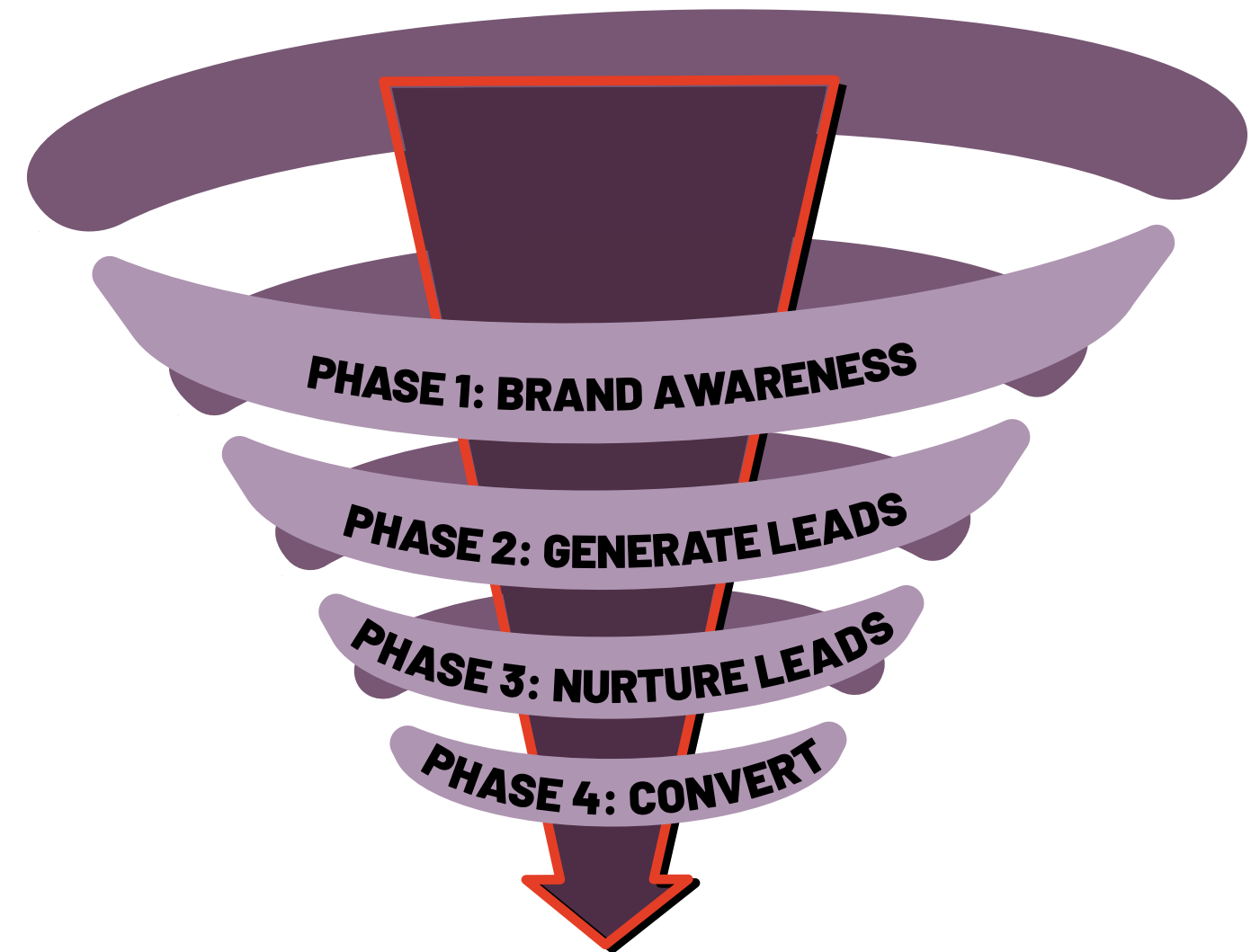
Last comes the proposal. And, if things go your way, they accept.

Now let us explain how this works in business.

PHASE 1: AWARENESS

We don't meet someone and immediately ask them to marry us. Yet, many of us take that same approach and attitude in our marketing.

We've all been guilty of expecting someone to create a long-term relationship with us just by us "showing up." It's easy to forget the other stages of the journey, and that our "sales" require a good deal of trust and commitment from our prospects and clients.



THE JOURNEY DOESN'T STOP AT A CONVERSION

We've listed the final phase of the sales funnel as "convert," but it should be noted that after your lead takes the action (conversion) it is usually followed by their experience with your brand, their loyalty, and their advocacy. If their experience with your brand is poor after their conversion, it's doubtful that they will continue their journey.

Remember, it's just as important to take care of the assets you own than it is to attain new ones!

PHASE 1 CONTINUED

Awareness is the first step:

- Getting your name out there.
- Setting up accounts.
- Connecting with prospects.
- Creating a website.
- Developing a presence.

PHASE 2: GENERATE

You're showing up in all the right places and making connections. Now you create content to spark the interest of your target audience. Your goal at this point is to get their contact information or connect in a way that allows you to nurture your budding relationship. This looks different on each platform and for each goal.

I.E. At this stage on LinkedIn, you want them to follow your page or connect with you. If they do, you have the ability to keep in contact with them and nurture their interest.

PHASE 3: NURTURE

Nurture the relationship by adding value to your lead. This is generally done by providing helpful information on the action you want them to take, making a personal connection, offering a free service, etc. The point at this stage is to show your target audience how you can make their life better. You want to get them to the tipping point.

PHASE 4: CONVERT

After you've shown your value, make your pitch. Then continue to follow up. Leads often bounce between your proposal and evidence of your value before finally making their decision.

READ ON TO PUT YOUR SALES FUNNEL INTO ACTION!

Develop a Strong Presence

Take Inventory

It's important to know where you show up online because as stated earlier, having a presence where your target audience is likely to frequent is phase 1 of your sales funnel. We've provided a checklist below of common places for you to have a presence.

Website

Your website is the primary source of information on your business. Make sure it maintains a clear and consistent message.

Blog or Vlog

Blogs are a great way to share your expertise and establish your proficiency while increasing SEO (Search Engine Optimization).

Facebook – Personal

When we say "personal" we actually mean a profile page with personal updates. Keep it classy. If your friends like to leave inappropriate comments, then have one private, personal profile with a different name and one public, personal profile for clients.

Facebook – Business Page

A business page is a lot like a profile, but it's for your business... that means put updates about financial news and personal updates on your team, firm, or clients.

LinkedIn – Personal

Again this means a page that's all about you (vs. your firm).

LinkedIn – Business Page

A business page really doesn't make sense to have unless you have multiple advisors at your firm. It allows a place to publish things as the firm. If you are a solo advisor, just keep the personal page.

YouTube

A YouTube channel hosts several videos. You can create a landing video on your channel and playlists. All of which increase SEO. Psst, did you know Google owns YouTube?

Google Business Page

Make sure to complete all sections. This is what shows up when people search for your firm on Google and what comes up when they look for directions in Google Maps.

Online Advertising

Online advertising is severely overlooked by financial planners. If you're trying to bring in new business online then you need to be advertising!

Published or Quoted in Online News

This is a great way to reach warm leads you wouldn't normally get face time with, and gives prospects and clients confidence that you actually know what you're talking about.

Published as a Guest Author on Another Professional's Blog

Getting quoted in the news isn't always easy. If you keep finding you are getting roadblocked, try reaching out to another professional who has a blog that you could be a guest author on. It takes a load off them on coming up with something. Plus, it gets you in front of their audience.

Chamber of Commerce Listing

The chamber of commerce exists to get businesses to come to your city. They want you to succeed because it makes other businesses want to move in. Take advantage of this and make sure you have a listing on their website.

BBB Listing

This is just one more avenue you can use to have a presence.

WONDERING HOW YOU STACK UP?

Find out here: kallicollective.com/digital-score/

Expand Territory

Now that you know where you show up online, it's time to answer the following two questions:

1. WHERE DOES MY TARGET AUDIENCE GO ONLINE?

We know we've said it before, but it's worth repeating. It is vital to know and understand your target audience. Put yourself in their shoes. Think about what is important to them and what they do on a daily basis. Then ask yourself where they go online. If they are avid travelers, it's a good idea to assume they frequent Airbnb, HomeAway, Kayak, Jetsetter, etc. If your target audience is big on buying local and supporting small businesses then they likely have joined NextDoor, Facebook local groups, LinkedIn local groups, etc.

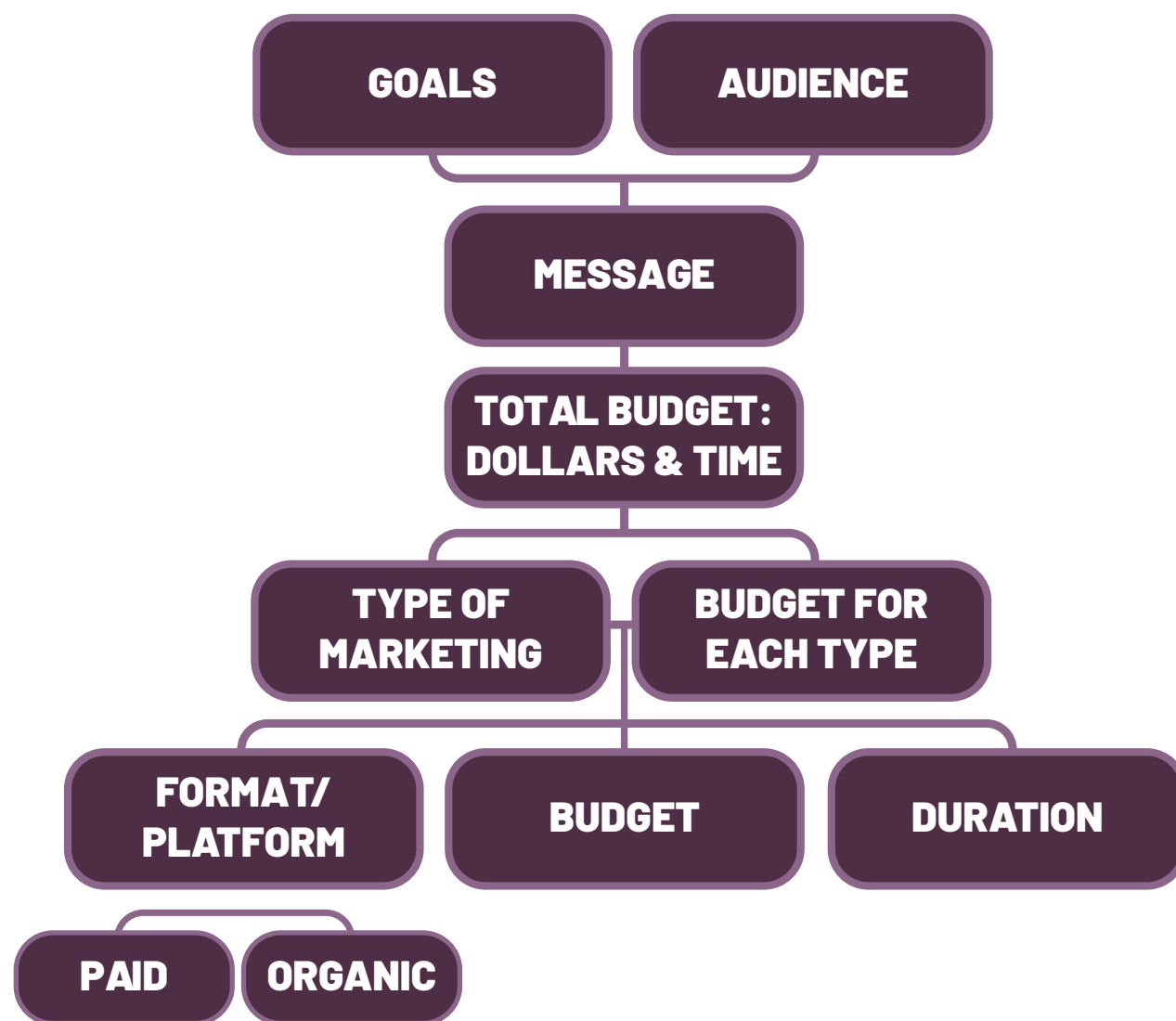
Make a list of the places you expect your target audience to be part of. Then see if you show up there. If not, it's time to make a presence!

2. WHERE DOES MY TARGET AUDIENCE'S PEERS GO ONLINE?

As humans, we are built to seek out and maintain community. Our community influences the way we think and the decisions we make. Just as important as understanding your target audience is understanding who your target audience interacts with frequently. Do the peers of your target audience go to different places online than your target audience? Would it make sense for you to show up there too? If so, add it to your list!

Build a Marketing Campaign

Campaign Diagram



GOALS & AUDIENCE

The first step in building a campaign is to define your goal and audience. This should be a breeze for you if you started this book at the beginning, since that was what we started with. Don't be afraid of getting detailed when you create this.

I.E. I want pharmacists who have just started their career to set up an initial meeting with me.

MESSAGE

Next, determine what message you want to send to your audience to persuade them to move forward on the desired action (your goal). This message doesn't have to be the exact wording that you use in your content. It's the conclusion you want them to draw that we are most concerned with.

I.E. I am knowledgeable about the challenges a new pharmacist faces, and have the expertise to guide their financial decisions. Setting up a meeting with me is easy and important for your financial well-being.

BUDGET

Budgeting for your campaign is a multi-faceted approach. To start, ask yourself how much you are willing to pay for your goal. This should include how much time you're willing to devote as well. Time, after all, is one of our most valuable resources.

I.E. I'm willing to spend 10 hours and \$5,000 for the month to get more meetings with pharmacists.

After you've determined how much you're willing to spend total, you need to budget how much you're willing to spend per type of marketing.

I.E. \$2,500 on radio; \$2,500 on digital marketing

PLATFORM: BUDGET, DURATION, TYPE

After you know how much you're willing to spend on digital marketing, you need to pick the platforms you want use, which we've already determined in the previous chapter.

Decide how much money you're willing to spend on paid advertising for each platform. The benefit of paid advertising is that you can guarantee that your content will be seen/heard. While there are those lucky few who go viral from organic content, they are the exception, not the rule.



You don't have to advertise on every platform that you use. Instead, focus on the platforms that make it the most challenging to get organic reach and/or the platforms that your audience uses the most.

Decide how long you want each piece of content to be publicized. If you're showing it on your website's homepage, do you want it to be there forever? If you're sending an email, do you want to send just one?

Last, make sure each phase of your sales funnel is included in the content of your campaign.

TRACK & REPEAT

Track your results at the end of every campaign to see if you should tweak anything, then repeat.

CREATE YOUR OWN

Become a Savvy Advisor to download a DIY Marketing Campaign form and watch a replay of our webinar if you need more help understanding:
KalliCollective.com/webinar-replay-resources/

Specific Platforms

Website

Your website is your hub, your powerhouse on the internet. It's one of the few platforms you have complete control over, so take control.

BEST PRACTICES

User Experience, User Experience, User Experience

Make your website easy, simple, and fun to use. Don't overwhelm your visitors with an abundance of information. **Overwhelmed = Exit.**

Even more important than the experience of the general public is your target audience's experience. Your website should be developed with them in mind. What does your target audience care about? What do they want to know before taking your desired action? Can they make that action on your website? Do they have any special needs that need to be accommodated for on your website?

Content

Keep it simple. Does your audience really want to read about your "four step process" that every other advisor uses? Do they want to read an entire page about your values or do they want to read about those values in action?

Don't make your website one long press release all about you - write as if you were writing directly to your target audience, because you are!

Each page should have a primary message and every section on that page should support that message.

Call your audience to action with interactive features and buttons. Unless you want to have an online brochure, give your website a purpose and a function.

Make a personal connection. The difference between you and a robo-advisor is a personal relationship, so make sure to create one on your website visitors. Include team photos and headshots in your "About" sections. Let people get to know you in your about sections and blogs.

Design

If your website isn't mobile friendly, it's not relevant. At least half of users are on their phones - make sure they have a good experience.

Don't be afraid of white space. Give your text and images some breathing space, or it will be too much for your audience to take in. They'll get overwhelmed and leave your website.

Eyes follow size and color. Use that to move your viewers' eyes through your page to the most important information.

Font

Just as important as mobile friendly is desktop friendly. If only half of your users are using a phone than the other half are on a desktop. Make sure the size and placement of your content isn't overwhelming or underwhelming.

Use sans serif fonts for large amounts of text. Serif (the letters have tiny little feet) is difficult to differentiate on a screen because they are made up of pixels. Fun fact, printing is the opposite. Those tiny feet help you keep your place on paper when reading large amounts of text.

Beware white text on black. It's hard on your eyes to read. If you do it, do it in small amounts.

Just like white on black is hard to read on a screen, so is black on white. Instead, use a dark gray. Dark gray is less harsh on your eyes to decipher and gives your website a softer feel.

Photos

Avoid skylines as your homepage hero picture. You're not a city municipality. In fact, most advisors work with clients all over the US, so why would you put a cityscape as the first thing a visitor sees? Ditch the impersonal city for people. It doesn't have to be pictures of you. It can be a stock photo, but it should represent your firm and what you do.

Fun fact, photographs with faces in them get looked at more than those photographs that don't. Bonus, your eye will follow where the person in the photograph is looking. Use that to your advantage to direct your visitors' eye movement.

Features

Consider using an appointment setting feature on your website, so users can make appointments directly. We recommend Calendly because it is the most used, which means most of your users will be familiar with how to use it.

Features Continued

Replace contact forms with an email address. Do you like submitting a form when you're just trying to get ahold of someone? Why would your audience? It's like getting an automated answering machine when you call a business.

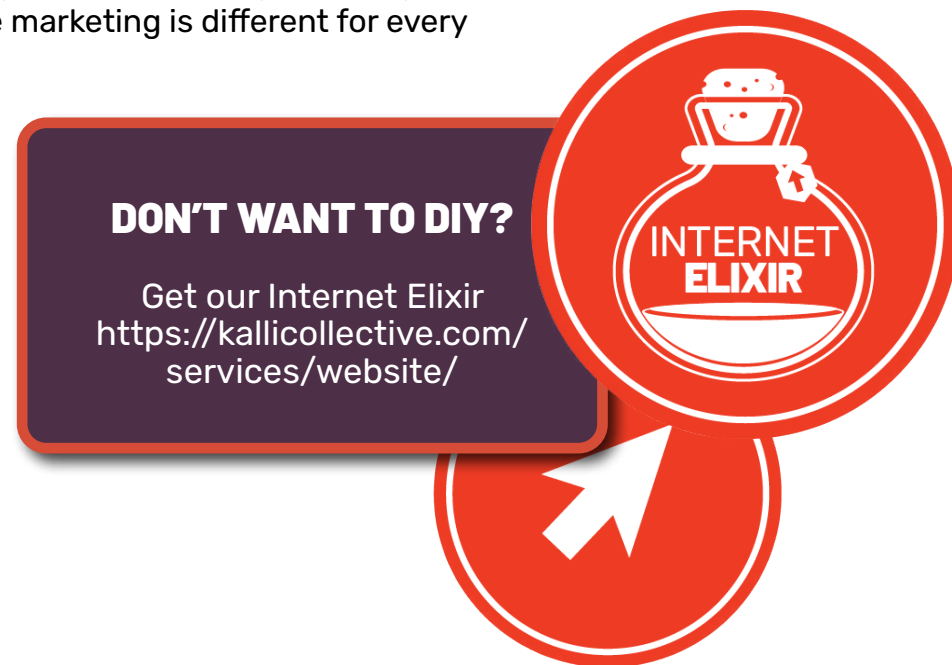
BUDGETING

Set aside **20 - 40%** of your initial website cost every couple of years for updates to keep you relevant with internet trends: If you spent \$10k on your website, set aside \$2 - 4k every couple of years

Set aside **10%** every year for content additions/changes - like a new office or product you're offering: If you spent \$10k, set aside \$1,000

Set aside **80%** every five years for those big renovation changes: If you spent \$10k, set aside \$8,000

Every five years, evaluate your costs and adjust to fit your business's needs because marketing is different for every business.



Social Media

SETUP

Every few months, social media platforms add new features or change the "setup" process enough that it makes it impossible to provide a step-by-step document on how to create a profile or page. There are still, however, applicable best practices to put into use as you set up your accounts.

Universally

Choose a thumbnail that is distinguishable at any size and has the same dimensions as the shape of the thumbnail. I.E. Don't pick a rectangle logo for a square or circle thumbnail.

If a tracking code is available to add to your website - do it. Even if it's only for advertising and you're not planning to advertise immediately. Those statistics are invaluable for retargeting your website visitors when you do choose to advertise.

Add the icon for the social media platform to your email signature and website as a link to your profile.

Facebook

Page vs. Profile

- Pages give you the ability to advertise your content and track your performance. They make the most sense for team-centric firms.

- Profiles are for persons only. They lack a lot of abilities that pages have, but content posted on profiles is shown to more people and produce more engagement organically.

Pick a short and logical username for your business page. This is what will be used at the end of your page URL.

Customize your business page tabs to what makes sense for your business and connect Calendly to the "call to action" button to provide the ability for visitors to schedule a meeting with you from your Facebook page.

Facebook Continued

Fill out every section that compliance allows. This not only gives you more content, but increases the SEO of your page.

LinkedIn

Page vs. Profile

- Just like on Facebook, a page will give you the ability advertise your content and track your performance. They also allow you to control how your firm is displayed on the profiles of any person who works for the firm. You can also notify your employees when you post new content so they can share it to their own profiles and network.

- Profiles are for persons only. They lack a lot of abilities that pages have, but content posted on profiles is shown to more people and produce more engagement organically.

Whether writing a page or a profile, write to your audience, not yourself.

Make sure to add your contact information to your description on your profile so even those who don't connect with you, can still contact you.

There was a marketing trend for a long time that in an effort to "be different," words became meaningless. Financial advisors became "dream architects." Titles like these are completely meaningless and confusing to your audience. Clear and concise is better than different and confusing any day. Don't make your audience guess what you do. Tell them point-blank.

"Feature" important content at the top of your profiles.

Use your logo as your page thumbnail and a professional headshot as your profile thumbnail.

HOW OFTEN YOU SHOULD REVIEW YOUR PROFILE

Setting up your profile can be tedious and time consuming, and just like your website, it's not one and done. You should refresh and add to your profile (or page) at a minimum once a year. As we stated before, each platform is rolling out new features regularly that may affect how your content appears.

POSTING BEST PRACTICES

- Post content that integrates each part of your sales funnel.
- Always create content for your target audience.
- Engage and interact with other users, and especially anyone who comments or engages with your business page content.
- Post content 70/30 informative to personal.
- Content should always be coming from you. Even if you share someone else's content, include your own commentary as an intro. This maintains your authority and expertise on the subject.
- Make sure you're using the right dimensions for any pictures or graphics you use for the platform you are posting to.
- Notify your employees when you post on your business page.
- Post videos directly to the platforms when possible.
- Put videos in playlists and/or series when posting on Facebook.

ADVERTISING

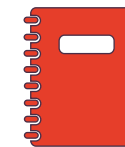
Advertising is the sure-fire way to guarantee that the content you are creating or purchasing is seen. Unfortunately, advertising on social media can be confusing and frustrating even for professionals. Here's our list of best practices to utilize in your advertising strategy:

- Boosting content on Facebook may be easy, but it's not effective. To get more bang for your buck, create an ad account and run ad campaigns. You have several more options for objectives and audience filters.
- Facebook costs far less than LinkedIn ads, but has less filtering options and more bots.
- Build up your page followers and post reach then retarget anyone who engaged with your content with the objective of leads and/or website visitors.
- Reach is the cheapest objective, but does more for your vanity than producing results - unless combined with another strategy.
- A good place to start with advertising on Facebook and LinkedIn is \$100 per campaign. Keep in mind that LinkedIn costs more to generate results.

Get Savvy

Additional Resources

**BECOME A SAVVY ADVISOR
AND GET ACCESS TO LOADS OF FREE RESOURCES.**



Rate this manual from your Savvy Advisor profile under Savvy Advisor feedback.



Get our event checklist.



Get our press checklist.



See how your digital presence ranks with our quiz.



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