

Develop Firm Messaging



Develop consistent messaging to build your brand and ensure continuity across all communications.

KEY OBJECTIVES

- Develop a messaging platform as the basis for all internal and external communication.
- Create marketing collateral to communicate and reinforce the firm's value proposition.

DEVELOP KEY MESSAGES AND POSITIONING

Develop strategic key messages and positioning that can be used across your marketing, including the website, collateral and campaigns.

- Develop your unique value proposition to clearly articulate how your firm adds value for clients. This is the basis for all marketing messages.
 - ▶ Unique Value Proposition Worksheet: Kaleido Creative Studio (www.kaleidocreative.com/members/messaging)
 - ▶ Key Messages and Positioning Consulting: AZ Communications (www.azcommunications.net)
- Develop the differentiators that make your company unique and distinguish you from your competition.
 - ▶ Key Differentiators Worksheet: Kaleido Creative Studio (www.kaleidocreative.com/members/messaging)
 - ▶ Key Messages and Positioning Consulting: AZ Communications (www.azcommunications.net)
- Develop the key messages that will clearly articulate to your target client how you can help them and that can be integrated across your marketing materials.
 - ▶ Key Messages Worksheet: Kaleido Creative Studio (www.kaleidocreative.com/members/messaging)
 - ▶ Key Messages and Positioning Consulting: AZ Communications (www.azcommunications.net)
- Develop a company elevator pitch that can be customized and used by all employees.
 - ▶ Elevator Pitch Worksheet: Kaleido Creative Studio (www.kaleidocreative.com/members/messaging)
- Develop a standard business description that can be used whenever someone needs a short paragraph explaining what the company does (e.g., press releases, sponsorships).
 - ▶ Boilerplate Business Description Worksheet: Kaleido Creative Studio (www.kaleidocreative.com/members/messaging)
 - ▶ Key Messages and Positioning Consulting: AZ Communications (www.azcommunications.net)

- Identify keywords that support your messaging that would be used to find your company through online channels.
 - ▶ Keywords Worksheet: Kaleido Creative Studio (www.kaleidocreative.com/members/messaging)

DEVELOP MARKETING MATERIALS TO COMMUNICATE MESSAGE

Develop marketing materials to communicate a clear message to prospective clients and centers of influence (COIs) about the value your firm adds and the services offered.

- Develop a firm overview brochure explaining the firm's offering and philosophy as a whole that can then be used as a handout or emailed to prospective clients.
 - ▶ Firm Overview Development: Kaleido Creative Studio (www.kaleidocreative.com/members/creative)
- Develop a pitchbook so that all prospective clients receive the same message and experience regardless of the financial advisor they work with.
 - ▶ Pitchbook Development: Kaleido Creative Studio (www.kaleidocreative.com/members/creative)
 - ▶ Pitchbook Checklist: Kaleido Creative Studio (www.kaleidocreative.com/members/collateral)
- Create consistent LinkedIn profile messaging for advisors and employees to use on their individual LinkedIn profiles.
 - ▶ LinkedIn Profile Standards Worksheet: Kaleido Creative Studio (www.kaleidocreative.com/members/social-media)
 - ▶ LinkedIn Employee Profile Recommendation Development: Kaleido Creative Studio (www.kaleidocreative.com/members/creative)
- Update the firm's LinkedIn company page with key messages and keywords.
 - ▶ LinkedIn Company Page Development: Kaleido Creative Studio (www.kaleidocreative.com/members/creative)
- Develop website copy to reflect your company's positioning, key messages and keywords.
 - ▶ Website Copywriting: Kaleido Creative Studio (www.kaleidocreative.com/members/creative)