

Develop a Thought Leadership Marketing Program



Develop a program that positions the firm beyond the primary principal as a subject matter expert within a niche market or other specialization.

KEY OBJECTIVES

- Build a lead database to use with current and future marketing efforts.
- Implement campaigns that generate awareness of the firm and drive traffic to the website.
- Develop calls to action that will entice prospects to provide their contact information in exchange for premium content.
- Develop a drip marketing system to nurture leads in the system until they are ready to schedule an appointment.

DEVELOP A CONTENT MARKETING STRATEGY

Build a content marketing strategy that all advisors within the firm can participate in.

- Identify which professionals in the firm will be designated "thought leaders" to create content on an ongoing basis. Consider having each thought leader focus on an area of expertise (e.g., retirement income, divorce financial planning, business owners).
- Have each thought leader commit to a specific schedule to create content (e.g., one piece per month).
- Build an editorial calendar of content (blogs, videos, podcasts, ebooks, etc.) with topics specific to the concerns of your target markets. Brainstorm questions these people might ask on Google, and create content around these topics. Avoid generic financial topics to differentiate yourself from other advisors. For each topic, assign a publication date and a thought leader responsible for the content creation.
- Develop an ebook or other premium resource for each target market identified by the thought leader that can be used for lead generation purposes.
- Build a one-hour presentation on a financial topic of interest for each of the identified markets that the thought leader can present online or in person for other organizations.

DEVELOP A LEAD GENERATION COMPONENT

Post premium content to collect contact information from leads that can then be inserted into the drip marketing process.

- Develop a landing page with a message that compels leads to provide contact information in return for downloading the ebook or premium resource.

- Add calls to action on the website to download the ebook or other premium resource developed for each market.
- Develop one webpage for each of the core markets to highlight the expertise of the firm and the individual advisors. Include the following information:
 - An overview of how you help that market
 - A list of upcoming events for that market
 - A feed of recent blogs or videos that address specific areas of concern for that market
 - A call to action to download the ebook specific to that market in exchange for providing contact information

DEVELOP A DRIP MARKETING SYSTEM

Develop a system for automatically nurturing leads in your database and encouraging them to schedule an appointment.

- Using a basic marketing automation system like MailChimp, create automated emails featuring a series of six messages following the download of a resource. The emails should avoid generic financial topics and instead be crafted to specific topics of concern or interest around the premium resource they downloaded. Be sure to include a click-through component and a call to action to request a consultation.
- Add all prospects to the general newsletter list.

SHARE CONTENT ON SOCIAL MEDIA

Build a content marketing strategy that all advisors within the firm can participate in.

- Train each thought leader on how to share content on their personal LinkedIn, Twitter and Facebook profiles. Have them share each time they publish new content. Ensure all social media profiles are archived by the company prior to having the employee post business related content.
- Have each thought leader post their blog or video blog transcript on LinkedIn Pulse 30 days after publishing to establish thought leadership with a larger community. Include a link to the original blog at the top of the article.
- Train each thought leader to identify content that would be of interest (financial and nonfinancial) to their market, and provide the content to the firm's social media manager to share across the firm's social media profiles.
- Utilize promoted posts on Twitter, Facebook or LinkedIn to drive traffic to landing pages with premium resources.