Integrated Marketing:

An Essential Approach to Maximizing Lead Generation and ROI

Strategies for optimizing a financial business' brand, website, social media and email marketing tactics.

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In today's competitive and technology-driven world, it is essential to have an integrated marketing strategy. The average consumer interacts with a brand seven times before making a purchase.[1] However, on average, consumers receive up to 10,000 ad-related messages each day.[2] This creates an enormous challenge for financial professionals in differentiating their brands and cutting through the clutter. One way to help ensure a business is seen and heard is through an integrated approach.

What is an integrated approach to marketing?

An integrated approach to marketing incorporates multiple channels that work in tandem to maximize overall marketing results. Utilizing an integrated marketing approach will help ensure prospects are reached from different avenues, on a consistent basis, with the goal of building familiarity with a brand and motivating prospects to act.

Financial professionals should consider an integrated approach to marketing for several key reasons:

1. **Reach more prospects across multiple channels.**

   A strategy that employs various channels, such as websites, social media (Facebook, LinkedIn), and email marketing expands an advisor's reach and opens the possibility to connect with more prospects.

2. **Create consistent messaging.**

   An integrated approach means that one's brand and value proposition is conveyed consistently across different marketing channels. This repetition strengthens brand recognition and reinforces positioning.

72% of consumers say they would rather connect with brands and businesses through multichannel marketing.[3]

3. **Improve conversion rates.**

   A cohesive multi-channel strategy leads to more touchpoints with prospects. The combined effect of outreach across channels improves conversion rates compared to using just one or two marketing tactics.

4. Deliver educational information.

Integrated marketing allows financial advisors to provide relevant and valuable content that reinforces the advisor's brand and value proposition to prospects at every stage of their journey – from awareness to consideration to decision making.

70% of consumers use three or more channels when researching a purchase.[4]

5. Advanced tracking and optimization.

With integrated marketing, advisors can track results across channels to determine what's working best. This allows them to optimize high-performing strategies based on data.

How Marketing Channels Connect

The first step to integrating marketing is to understand how key marketing channels connect.

Brand

Define brand including the logo, voice, and unique value proposition. This is the foundation of all integrated marketing tactics.

Social Media

Establish a professional social media presence that reflects the defined brand and attracts leads through pertinent content that drives them to the website.

Website

Create a professional website that delivers value through relevant, educational content, provides a clear call to action and captures leads.

Email

Distribute applicable email content that delivers value through significant, educational content, communicates the brand's unique value proposition and delivers a clear call to action.

Branding

Before integrating various marketing channels, it is vital to have a professional brand and distinct message. A strong brand identity is comprised of a few elements that, when used consistently, can create a unique and memorable experience for anyone encountering the business. A successful brand identity will create a strong first impression, stand out from the competition, build trust and loyalty with clients and increase overall brand recognition.

50% of consumers are more likely to do business with a brand when they recognize the logo.[5]

Key branding elements include:

- **Clear Positioning:** Having a distinct brand positioning and value proposition sets the brand and business apart.
- **Consistent Messaging:** Using consistent language and messaging across all touchpoints and channels helps reinforce a brand.
- **Visual Identity:** Having distinctive visual elements like a logo, font and color palette helps identify the brand.
- **Delivers Value:** Living up to the brand's promise consistently by delivering quality products and services.

Brands have both visible and invisible components, like an iceberg floating in water. The visible portion consists of tangible elements that we can directly perceive, such as logos, ads, products and stores. Underneath the surface, unseen elements shape how prospects and clients can feel about a brand.

Social Media

Social media can be one of the simplest and most cost-effective channels for increasing visibility and brand awareness. 81% of financial advisors who use social media say they've gained new business assets through their efforts. Advisors using social media successfully report an average of $1.9 million in assets gained through their activity. By utilizing organic content, advisors position themselves directly in front of their target audience.[6]

Nearly 50% of investors say social media impacts whom they hire as a financial professional.[6]

4 Ways to Optimize Social Media Presence

1. **Utilize Professional Imagery**

   Use clear, professional images including the logo, personnel headshots or group shots for the account profile and banner images.

2. **Include a Business Overview**

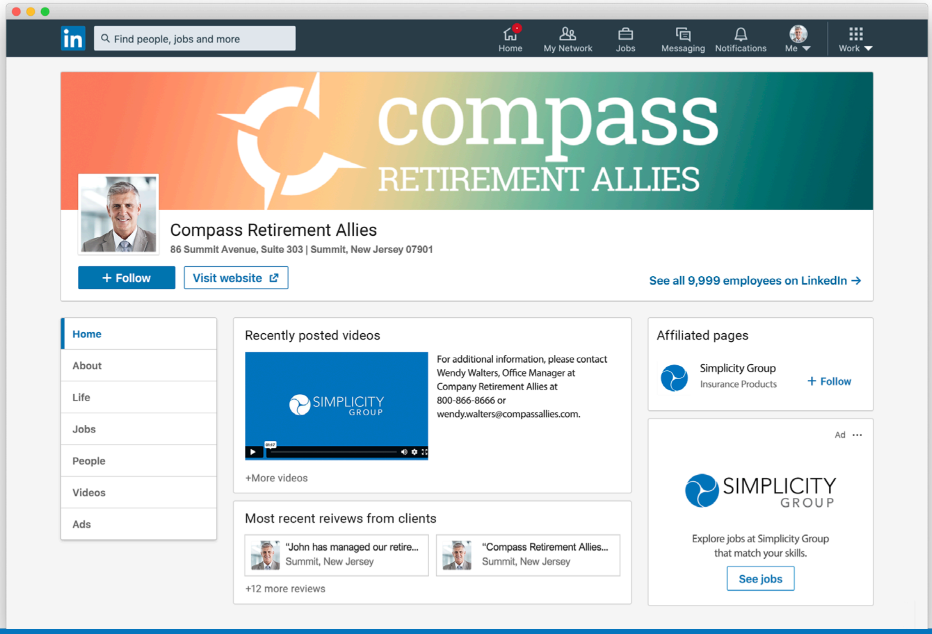
   Communicate the business' solutions (service offerings) and unique value proposition in the business overview.

3. **Include a Professional Bio**

   Professional bios should communicate experience, expertise, licensure, education and founder's story to build credibility.

4. **Build the Business' Network**

   A strong network will provide new insights into the business, clients, target market, complementary service providers and partnership. Follow and interact with content related to the business.



Website

A website is the marketing main stake for a business as it's where clients and prospects will go to learn the most about a business. A high-quality website can cultivate a strong first impression by incorporating informative and educational content along with professional and visually appealing design.

75% of users judge a company's credibility by looking at a website's design.[7]

Following the simple guidelines below will help optimize a business' web presence:

Ensure the Site is Visually Appealing

- Having brand consistency from the logo and company colors to easy-to-read fonts and compelling imagery is a vital part of creating a high-quality website that consumers will favor.

Utilize Simple Navigation

- Utilize simple navigation including distinct buttons, links, a search bar and straightforward contact information and methods to create a well-performing website.

Post New and Relevant Content

- Post articles or blogs about topics that are timely and relevant to clients and prospects.
- Promote upcoming events such as educational workshops, lunch and learns and/or referral and retention events.

Highlight Client Success Stories

- Include client testimonials and success stories to build credibility and trust with potential prospects.
- Showcase awards and achievements to support credibility.

Incorporate a Lead-Generating Call to Action

- Publishing an educational marketing piece (i.e., white paper, tips sheet, guide, etc.) for prospects to download provides an opportunity to collect contact information.
- Be clear in all calls-to-action so a prospect knows what to do and how to do it (i.e., Enter your email to download now).
- Incorporate a contact section and contact form on the site.

Email

The power of an integrated marketing approach lies in the ability to generate and gather leads from various channels to build an email marketing list. An email marketing list allows advisors to deliver specific content relevant to targeted groups on a consistent basis. This helps build familiarity with the brand and ultimately results in new business.

74% of marketers said that targeted messages and personalization of emails improve customer engagement rates.[8]

There are numerous ways to optimize the performance of email marketing tactics including:

Create an engaging subject line.

- Subject lines are often the determining factor of whether an email is opened or sent to the trash. Ensure the subject line is concise with no more than nine words.
- Use numbers and statistics to garner attention and substantiate claims.
- Personal language such as “you” and “yours” to increase consumers’ likelihood of opening.

Personalize and target emails.

- Segment email lists into specific groups (i.e., clients, prospects, annuity clients, life insurance clients, investment clients) and email relevant content to each group.
- Use first names and tailored content to consumers’ situations.

Be clear and concise with content.

- Limit the email word count to 125 words and use graphics to increase an email’s performance.
- Design an email that is easy to skim with a clear call to action, so the prospect/client can easily understand what the business is asking them to do.

Utilize a drip campaign.

- Create a campaign with 4 to 10 emails spaced out 4 days to 2 weeks apart.
- Plan campaign content around the prospect’s journey (i.e., new subscribers may benefit from brand awareness-themed content).
- Conduct A/B testing (i.e., try the same email with two different subject lines) and analyze data to better understand the effectiveness of the campaign.

Integrated Marketing Support for Financial Professionals

In summary, an integrated marketing strategy enables financial advisors to achieve greater visibility, stay top-of-mind, nurture prospects effectively and get better results from their marketing efforts overall. Combining multiple tactics is key.

From brand creation and website design to social media and email marketing tactics, Simplicity helps advisors and agents design and implement an integrated marketing strategy that works to establish brand awareness, generate leads and optimize their return on marketing investment.

Contact Simplicity Group to learn how to qualify for complimentary marketing support.

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