



Seven steps for increasing your discoverability online

Travis Smith, *Senior Director of Digital Marketing Product Management, Broadridge Advisor Solutions*

In an increasingly saturated digital environment, how do you maximize opportunities for prospects to discover your brand?

INTELLIGENT TARGETING CAPTURES THE RIGHT PROSPECTS

Maintaining a competitive position in the industry means not only driving traffic to your website—it also means converting those visitors to future clients. With only two percent of website visitors converting on their first visit, your approach to discoverability must be strategic and replicable.

By implementing these seven steps, you can optimize your prospect-to-client conversion process.

1. DEFINE YOUR IDEAL PROSPECT

With the seemingly infinite reach of the internet, it can be tempting to take a wide-scale approach to attracting prospects. However, it's more effective to narrow your target market, meet prospects where they are and communicate through the channels they prefer.

Take a moment to assess your top ten higher-value clients: What are the common themes that emerge from their demographics, interests and habits? Use these insights to develop a client profile. Understanding the interests and concerns of your ideal prospect will help inform your targeted marketing strategy and better attract these prospects to your website.

2. IMPLEMENT SOCIAL LISTENING

To gain deeper insight into how prospects view your brand and your competitors, it's important to monitor the social media channels that your qualified prospects frequent. However, finding the time to implement this useful strategy may be challenging. Broadridge's in-house editorial team helps expand advisor capacity by actively researching which topics are most attractive to investors. Our experts analyze engagement and monitor keywords that are trending.

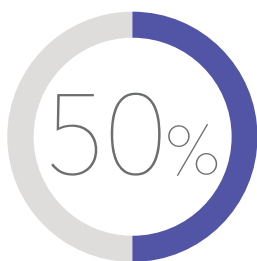
3. DIVERSIFY YOUR TOUCHPOINTS

Research shows that a cross-channel digital strategy is a must for growth-oriented advisors. A 2019 study¹ that Broadridge conducted revealed that growth-oriented advisors who use a multi-channel digital approach achieve a client acquisition rate greater than three times the rate achieved by advisors who don't use multiple channels. Digital channels include website, social media, email, digital advertising (including remarketing ads) and search. It's critical that every touchpoint leads back to your website so you can recapture traffic and create a lead capture funnel.

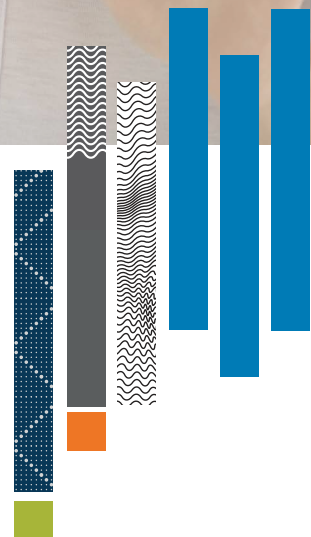
Adding elements of each channel into your strategy will help ensure you're reaching your prospects in the channels they frequent the most; this is especially true of remarketing banner ads, which deliver ongoing brand reminders to your previous website visitors. This is a non-intrusive marketing strategy you've probably seen in action. Online retailers, especially giants like Amazon, use retargeting ads to remind visitors to return to their website and pick up where they left off.

4. ESTABLISH MULTIPLE ROUTES

Consumers today have multiple ways of finding websites online—social media, search engines, review sites, map apps, etc. While it is important to have a presence through as many channels as possible, these efforts must be replicable and sustainable. You must monitor your brand information online to ensure it is recent and comprehensive. Research suggests that complete and accurate local listings have a 50% greater chance of leading to a purchase.² Whatever combination of channels you choose, they should complement each other to maximize their collective impact.



Research suggests that complete and accurate online local listings have a 50% greater chance of leading to a purchase.



5. CRAFT VALUABLE CONTENT

Consistently delivering relevant and compelling content is an industry best practice. As you deliver your content through multiple channels, you open the door to lead nurturing, becoming a valuable resource and building trust with prospects. This is the same trust you want them to have in your ability to maximize their life savings and future retirement.

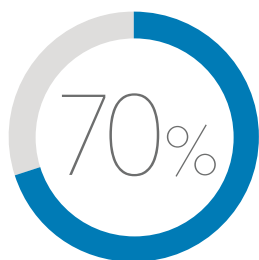
As an added bonus, sharing keyword-rich content through your website and social media profiles is a surefire way to boost your discoverability as investors search for answers online.

6. OPTIMIZE YOUR WEBSITE

The overwhelming number of search results competing for a consumer's attention puts the first impression you make at a premium. Growth-oriented advisors take a methodical approach to designing a website that delivers ROI. Starting with the basics, key components include simple navigation, a clear goal on each webpage, and messaging and imagery that resonate with your target client. Upgrading your visuals to include an intro video will elevate the look and feel of your site. Communicate clear calls to action on every webpage to motivate visitors to engage with your brand.

Once the basic components have been integrated, strategically build upon them to increase engagement. A mobile-responsive and flexible design for your website is a must. To ensure mobile-friendliness, highlight three to five of your services best known to generate referrals. Research shows that mobile websites which load in five seconds or less retain visitors for 70 percent longer than their slower counterparts.³ Carefully evaluate each component of your website to ensure you optimize every visitor's experience.

Finally, your website must be optimized for search engines and for users. Implementing XML sitemaps, optimized title tags, correct website heading structure and other key elements helps ensure your website can be found and indexed. The Broadridge team includes SEO experts who analyze our advisor website templates to ensure websites are discoverable.



Research shows that mobile websites that load in five seconds or less retain visitors for 70% longer than their slower counterparts.



MAKE YOUR FIRST IMPRESSION COUNT TO MAXIMIZE DISCOVERABILITY

Understanding what matters to your prospects better positions you to deliver what they need. Integrate these seven strategies into your marketing strategy to attract the right prospects, gain their trust and convert them into new clients.

7. AUTOMATE YOUR APPROACH

Coordinating and consolidating the various components of your marketing strategy requires commitment. The road to prospect conversion can take weeks to a few months. Even though the payoff is worth the investment, too often advisors lose potential new clients by neglecting the lead nurturing process.

Limited time is a primary barrier to successful conversion and is the reason leading advisors turn to automated digital solutions. Automating the time-consuming, manual processes frees you to focus on what really matters—your clients.

Ready to optimize your digital presence?

Our targeted digital marketing approach is non-intrusive, yet effective. We're ready to help maximize your digital brand to appeal to the most discerning prospects.

broadridge.com/advisor/AttractNewClients

Broadridge, a global Fintech leader with over \$4 billion in revenues and part of the S&P 500® Index, provides communications, technology, data and analytics. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

broadridge.com/advisor



© 2020 Broadridge Financial Solutions, Inc., Broadridge and the Broadridge logo are registered trademarks of Broadridge Financial Solutions, Inc.

WM_00066_AR_20

ABOUT THE AUTHOR



Travis Smith is Senior Director of Digital Marketing Product Management for Broadridge Advisor Solutions,

where he oversees multi-disciplinary teams that help financial services firms implement digital marketing strategies, solutions and technologies.

¹ Broadridge advisor survey, 2019

² Ipsos Research, Benefits of a complete listing, 2017

³ Omnicore, 2018



Ready for Next

Communications
Technology
Data and Analytics