

Overcoming Referral Roadblocks

Five effective strategies for capturing new clients

You deliver value to your clients, but how can you motivate them to drive referrals to you? Effective client acquisition requires a proven method. Follow these five strategies to revamp your process.

01. Communicate your value

Establish a consistent referral-acquisition protocol that is memorable and personalized.



A

Start with a **crisp script**.



B

Your top clients know the quality of your services. Go beyond this fact to **communicate “the why”** —the reason you became an advisor.



C

Describe what motivates your **commitment as a partner** in achieving their financial goals.



D

Communicate that you are **always ready to do the same** for the people they care about.

02. Build a referral-ready website

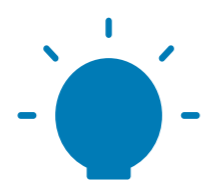
Make it easy for your clients to be referral-generating advocates by creating a shareable online experience.



Simple navigation



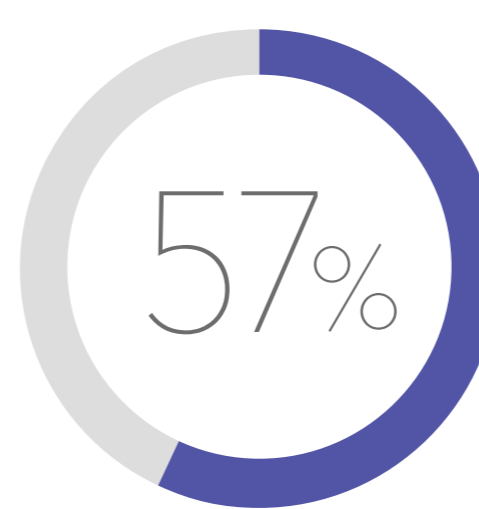
Clear calls-to-action



Engaging visuals and valuable content



Dynamic and mobile-friendly design



57% of all mobile users decline to recommend a business that has a poorly designed mobile website.¹

¹Omnicores, June 2020, <https://www.omnicoreagency.com/digital-marketing-statistics/>

03. Leverage local search

Ensure referrals can find you online. Confirm that your business is appearing across local search and mapping platforms, and that the listing is complete and correct. Reinforce website activity with optimized local listings online.



Complete business listings get on average seven times more clicks than empty listings.²



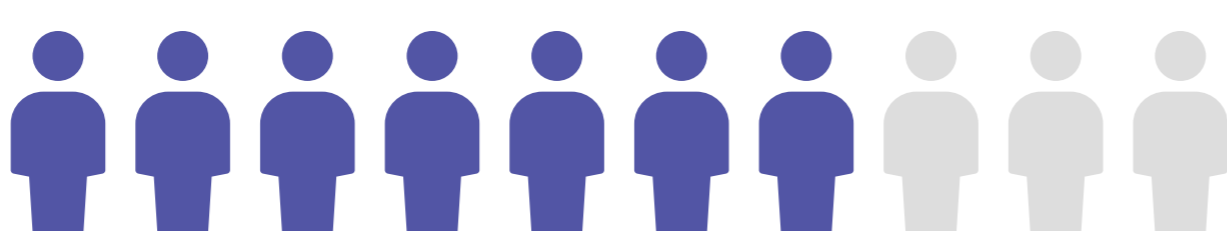
Location-specific ads outperform traditional banner ads and are 20 times more effective.³

²Ipsos MORI, Aug 2014, Impact of search listings for local businesses

³Omnicores, June 2020, <https://www.omnicoreagency.com/digital-marketing-statistics/>

04. Bring referrals back to your site

Many web visitors aren't ready to act during their first website visit. Once they leave, it's out of sight, out of mind. Reinforce your brand and bring them back to your site with digital retargeting ads.

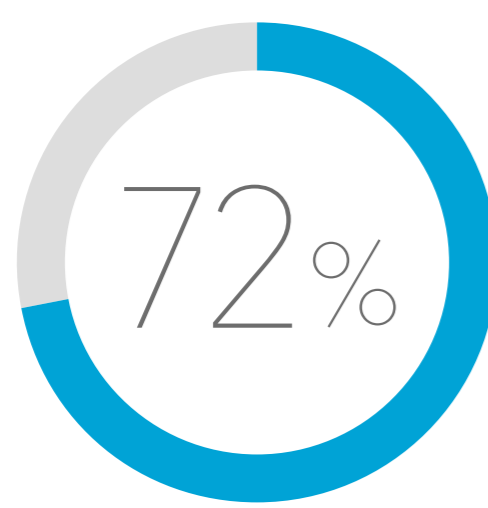


70% of marketers use retargeting to boost brand awareness.⁴

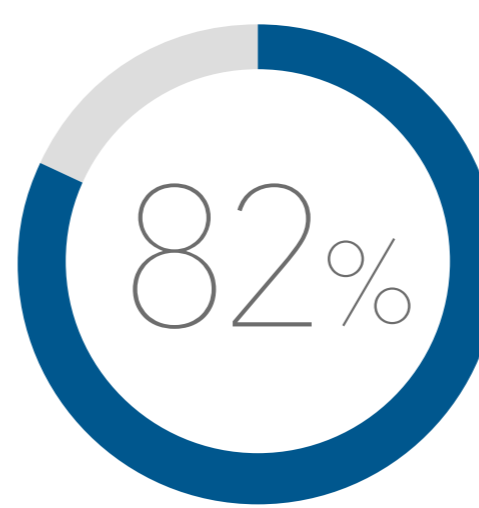
⁴Hristina Nikolovska, "27 Retargeting Statistics Marketers Must Know in 2020," TrueList, September 1, 2020, <https://truelist.co/blog/retargeting-statistics/>.

05. Optimize email communication

Email is a leading communication channel that is an integral part of your referral-acquisition and lead nurture strategy.



72% of consumers prefer email as their number one communication method for business transactions regardless of age demographics.⁵



Emails that are part of a segmented campaign are 82% more likely to be opened.⁶

⁵Omnicores, June 2020, <https://www.omnicoreagency.com/digital-marketing-statistics/>

Seeking more referrals? Let's work together.

Our targeted digital marketing approach is non-intrusive, yet effective. Broadridge has the industry expertise to help you revamp your digital presence to appeal to the most discerning investors. Our setup is simple and fast, including integrated compliance review.

broadridge.com/advisor/AttractNewClients