

Before we get started

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From business strategy to marketing tactics and everything in between



Presented by
Sarah Wolfe, Marketing Manager, Netwealth

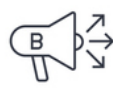
"The best marketing doesn't feel like marketing."

-Tom Fishburne

So many choices!



AFFILIATE MARKETING



BRAND MARKETING



INBOUND MARKETING



GUERRILLA MARKETING



CAUSE MARKETING



CONTENT MARKETING



DIGITAL MARKETING



CONVERSATIONAL



CONTROVERSIAL



CUSTOMER MARKETING



EMAIL MARKETING



EVENT MARKETING



EXPERIENTIAL



GLOBAL MARKETING



1 PT → BUZZ MARKETING



2 PT



INFLUENCER MARKETING



NEUROMARKETING



PARTNER MARKETING



SEARCH ENGINE



SOCIAL MEDIA MARKETING



VIDEO MARKETING



PROXIMITY MARKETING



STORY TELLING



STEALTH MARKETING



PRODUCT MARKETING



OUTBOUND MARKETING



CONTEXTUAL

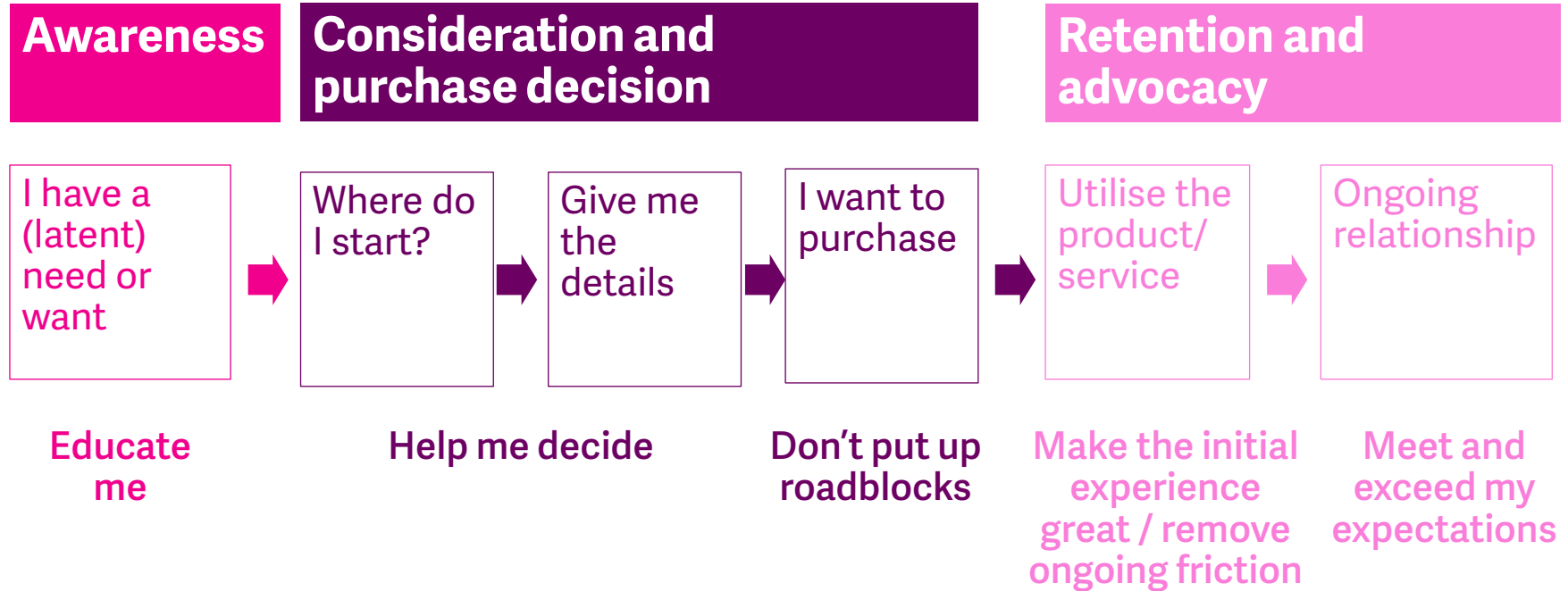


ACQUISITION



MARKETING AUTOMATION

Customer path to purchase framework



Example: Car purchasing



from What One Consumer's Car-Buying Process Reveals About Auto Marketing Opportunities

Stacy's car-buying journey included over 900 digital touchpoints* in a 3-month period



Occurred on Mobile

-  139 Google Searches
-  14 YouTube Videos
-  89 Images
-  69 Dealer Interactions
-  186 Manufacturer Interactions

Explored
14 Brands



Considered
6 Brands

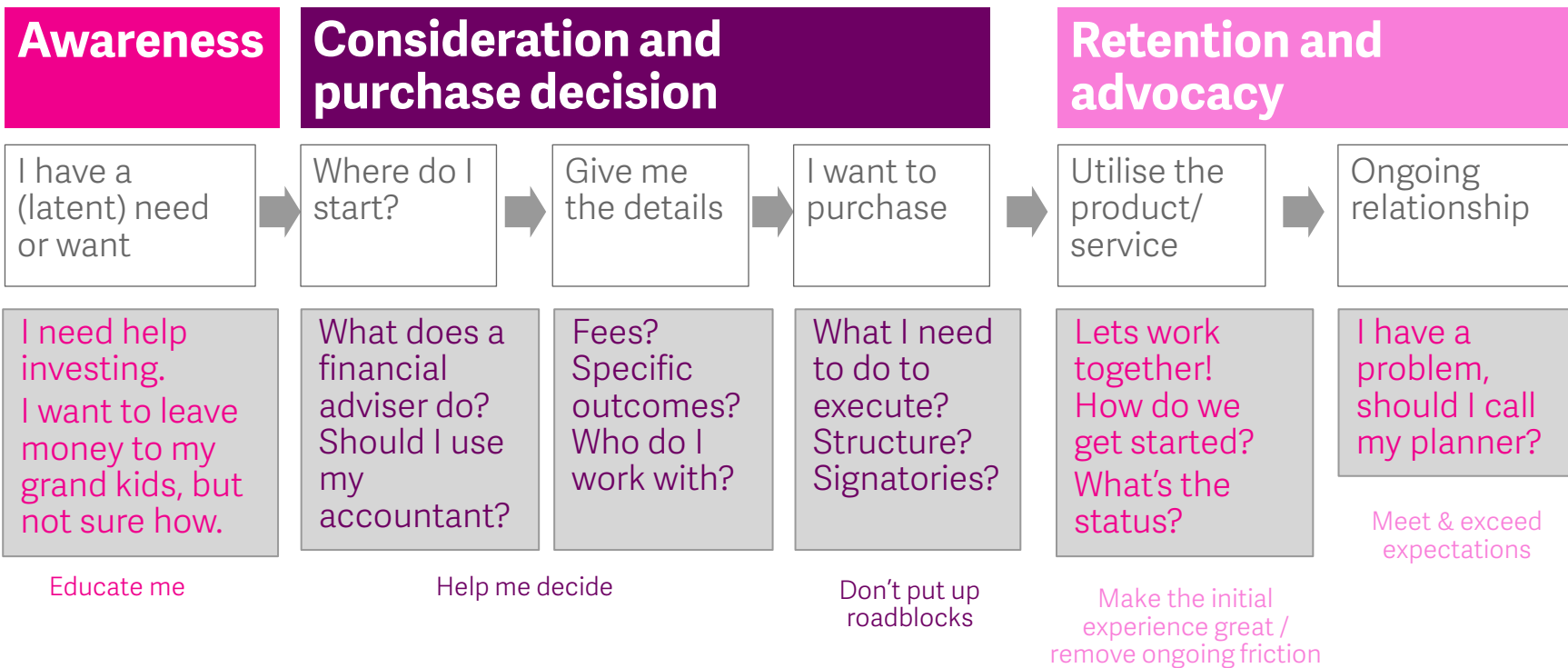
Decided Between
2 Brands

*Touchpoints = searches, website visits, video views, and clicks. "Brands explored" included at least five interactions; "brands considered" included at least 20 interactions, and "brands decided between" included at least 100 interactions.

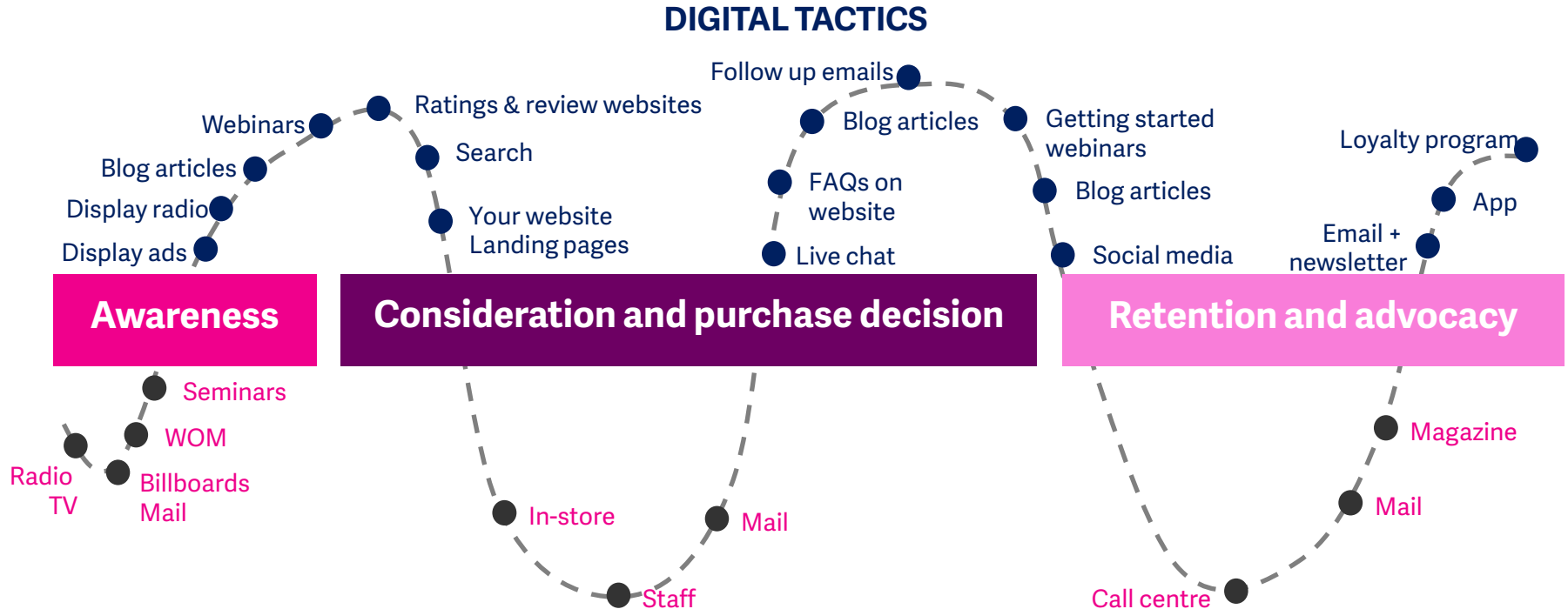
with Google

thinkwithgoogle.com

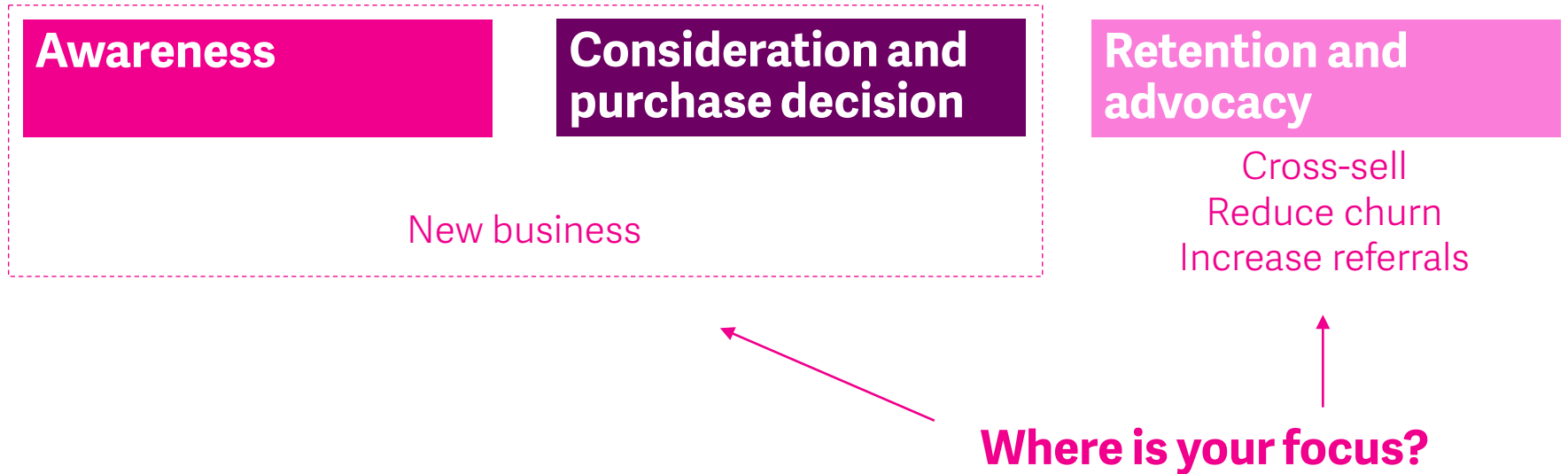
Adviser client path to purchase



Still, so many choices!



What is your business strategy?



**“Good marketing makes the
company look smart.
Great marketing makes the
customer feel smart.”**

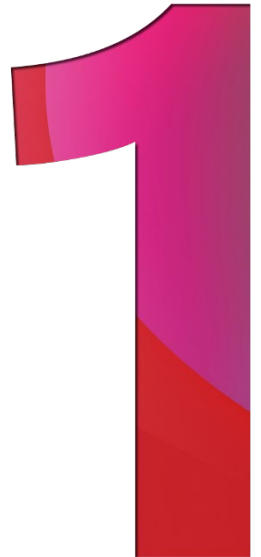
– Joe Chernov

Practical strategies and tactics

1. Content marketing
2. The first 100 days
3. Digital advertising



Content marketing



LES GUIDES MICHELIN

FRANCE	ESPAGNE ET PORTUGAL
BRITISH ISLES	ALPES ET RHIN
DEUTSCHLAND	LES PAYS DE SOLEIL

GUIDE TO THE

LONDRES
BRITISH ISLES

BERLIN
DEUTSCHLAND

FRANCFORT
DEUTSCHLAND

MILAN
ALPES ET RHIN

VIENNE
ALPES ET RHIN

GENÈVE
ALPES ET RHIN

ZÜRICH
ALPES ET RHIN

MADRID
ESPAGNE ET PORTUGAL

LES PAYS DE SOLEIL

ALGERIE TUNISIE
GUIDE DES PAYS DU SOLEIL

CLERMONT FF Michelin et C^{ie}.

LONDRES Michelin Tyre C^o Ltd.

FRANCFORT Deutsche Michelin.

BERLIN Pneumatik A.G.

MADRID Sociedad anónima del Neumático Michelin.

MILAN Agenzia italiana dei Pneumatici Michelin.

VIENNE Michelin et C^{ie} Agence belge

GENÈVE Österreichisch Ungarische Michelin Pneumatik GmbH.

ZÜRICH Agence Genève suisse du Pneumatique Michelin.





Home



Trending



Subscriptions



Library



SugarMamma.TV

for your complementary budget, subscribe at sugarmamma.tv

f like SugarMamma.TV

t follow me @yousugarmamma

i follow me @sugarmamma.tv

SugarMamma



Sugar Mamma



122K subscribers

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PLAYLISTS

COMMUNITY

CHANNELS

ABOUT



Uploads PLAY ALL

SORT BY

**DECLUTTER TIDY CLEAN & MINIMALISM MADNESS AS...**

6.7K views • 5 days ago

**FASHION CAPSULE WARDROBE 7 WORKING...**

7.1K views • 1 week ago

**Make any outfit look chic**

13:11

**WATCH ME BUY SHARES!**

9:30

How To Buy Shares/Stocks Online – Watch Me Invest In...

7.5K views • 2 weeks ago



9:20

Building Your Share Portfolio - Part 3 - What does...

6.8K views • 3 weeks ago



4:50

\$400,000 p.a Investor Reveal: The 'Stupidest' Thing To...

7.9K views • 3 weeks ago

**UPDATED EDITION:****SECRET STRATEGIES****Don't make**

Home

Trending

Subscriptions

Library

6:46

Financial Independence Retire Early - How does...

9.1K views • 4 weeks ago

9:55

7 Hacks To Protect Your Mortgage, Home & Your...

9.3K views • 1 month ago

10:23

Limited Funds & Lost Job? 7 Hacks To Remain Financial...

9.5K views • 1 month ago

10:31

How to not lose money: Investment Portfolios,...

8.9K views • 1 month ago

13:12

How To Pack Like A Minimalist & Live Lighter ||...

4.7K views • 1 month ago

5:36

THE BLESSINGS, LESSON & WISDOM TO BE FOUND FROM THE CORONAVIRUS

10K views • 1 month ago

14:41

My Frugal Life Challenge - 30 Days Highs & Lows ||...

7.7K views • 1 month ago

9:40

Coronavirus Market Plunge: What The Media Isn't Tellin...

18K views • 2 months ago

6:06

Watch Me Save \$3,300 Being Lazy On The Sofa From...

7.4K views • 2 months ago

12:10

LUX BEAUTY FOR LESS: MY BEST BUDGET BEAUTY...

10K views • 2 months ago

16:49

How To Dress Like A Millionaire On A Budget - M...

18K views • 2 months ago

16:34

Truth: How My Partner And I Combine Finances!

9.5K views • 3 months ago

10:51

How To Save Money On Food: My Best Frugal Food Hacks ...

12K views • 3 months ago

14:33

Decluttering, Tidying and Marie Kondo Minimalism - 1...

44K views • 3 months ago

12:56

7 Style Tips To Maximise Your Capsule Wardrobe Fro...

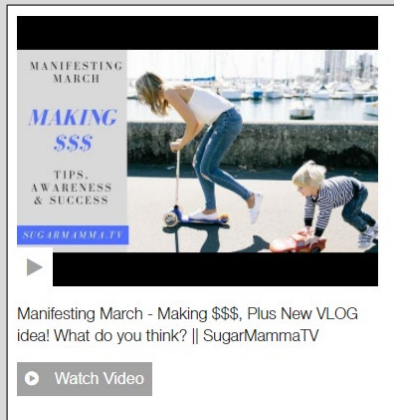
21K views • 3 months ago

YOUR JOURNEY IS YOUR OWN

Mindful Money

BUDGETING MISTAKES TO AVOID

HOARDER BOYFRIEND VS. MINIMALIST GIRLFRIEND



2+ videos per week



120+k followers

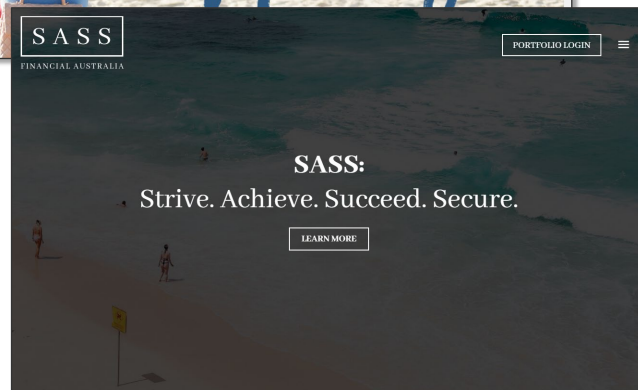


53k followers




17k followers

<http://sugarmamma.tv/>



<https://www.sassfinancial.com.au/>



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Schedule a chat

SIGN UP

LOG IN

UPCOMING WEBINAR

Rising geopolitical risks and portfolio implications


With investors experiencing some volatility in recent months during this 45-minute webinar, Jeff will be joined by Alphinity's Global Portfolio Manager, Mary Manning as they discuss global markets, how portfolios can be positioned to mitigate risks and seize opportunities and what investors can expect as we progress through 2022.

+

WEBINAR REGISTRATION

When	24th March 2022
Time	12.30pm -1.15pm

I'D LIKE TO REGISTER



Ep 111: Mattias Westman & Akshay Bhutiani - Value amongst volatility; investing in Russia

Interviews the leading minds in

David Clark is an experienced

ial Services Professional. As a

t Koda C... [see more](#)


Phil King - Don't get too

o early

5 min 54 sec

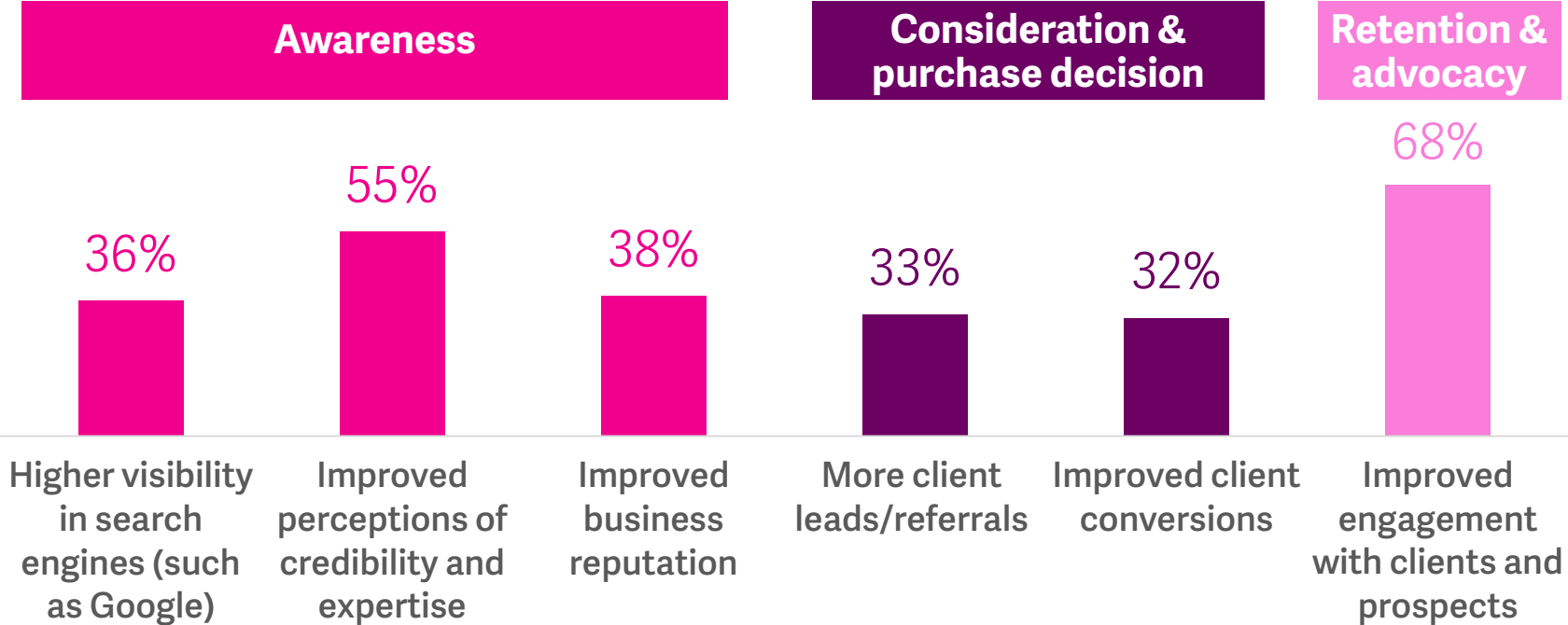
Leadership

17 | **netwealth** See wealth differently (general use)

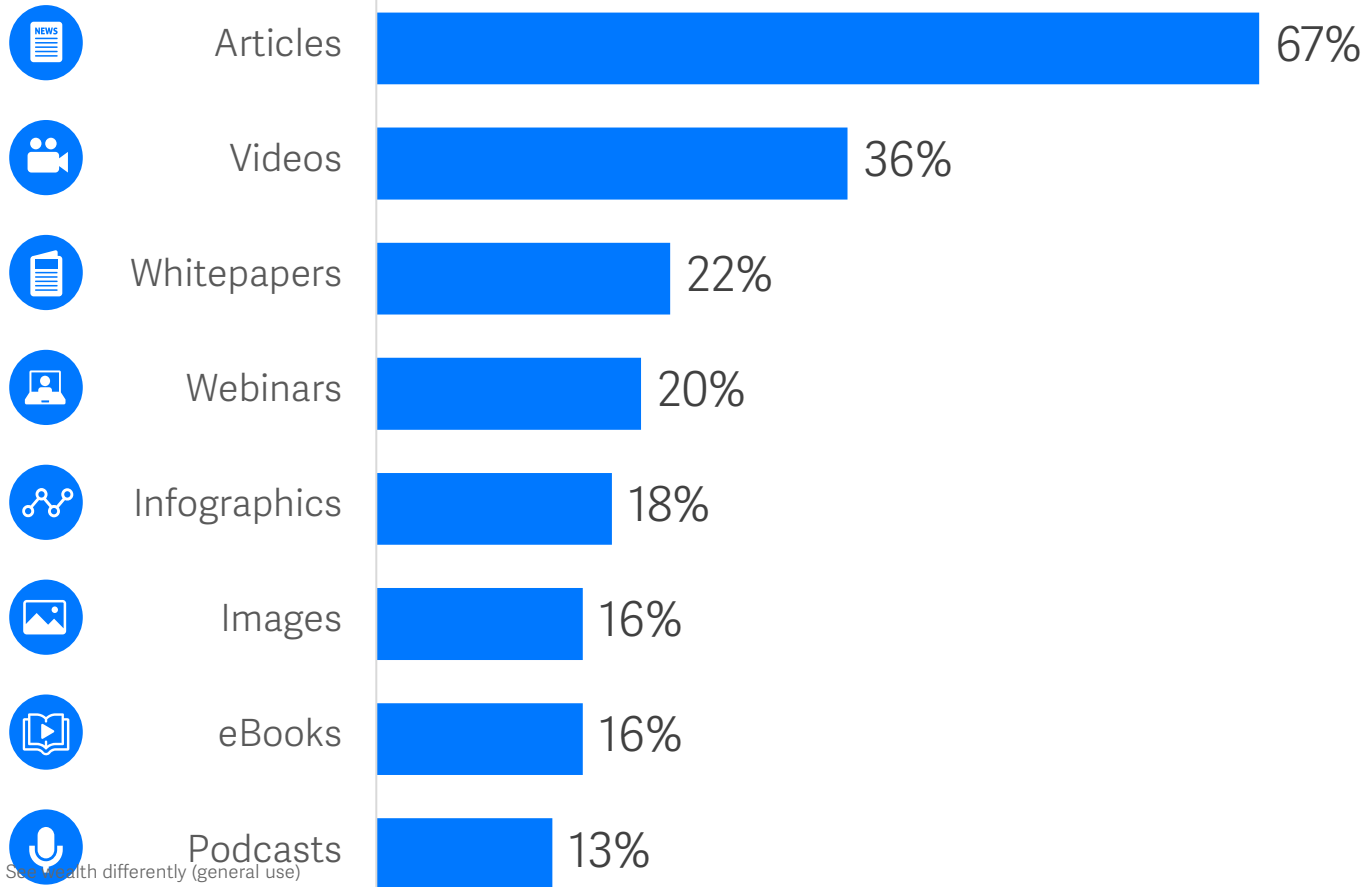


Real business benefits

What key benefits do you receive from your content marketing activities?



AdviceTech Stars: Which of the following types of content do you create for clients?



AdviceTech Stars: How do you distribute content to your clients?



95%
via email database



Frequency of sending
61% send email at least monthly
31% at least quarterly



60%
via website/blog



Frequency of updating
22% update website at least weekly
60% at least monthly

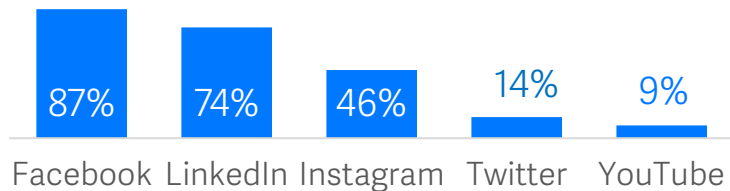


55%
via social media



Frequency of posting
42% post at least weekly
20% at least monthly

Most used social media network



16%
via paid online ads



16%
via podcast services,
e.g. iTunes

One big idea...

1. Choose your target audience

Pro tip: Its not your entire client base!

2. Come up with one big idea

Pro tip: Speak to your target audience, listen to their needs

3. Create a long-form piece (written, audio, video or presentation) or short series

4. Convert that into several short form content pieces

Pro tip: This should give you 3-4 months worth of content

5. Distribute your content

6. Repeat 2-3 per year



e.g. White paper or podcast series



Article



Infographic



Webinar,
seminar



Video



Podcast /
interview

Example: Netwealth AdviceTech

www.netwealth.com.au/advicetech



- • Keynote presentation
- 5x webinars
- • 3x videos
- 20+ social media posts
- • 1x workshop
- • 2x press releases
- 30+ media mentions

More tips when creating content

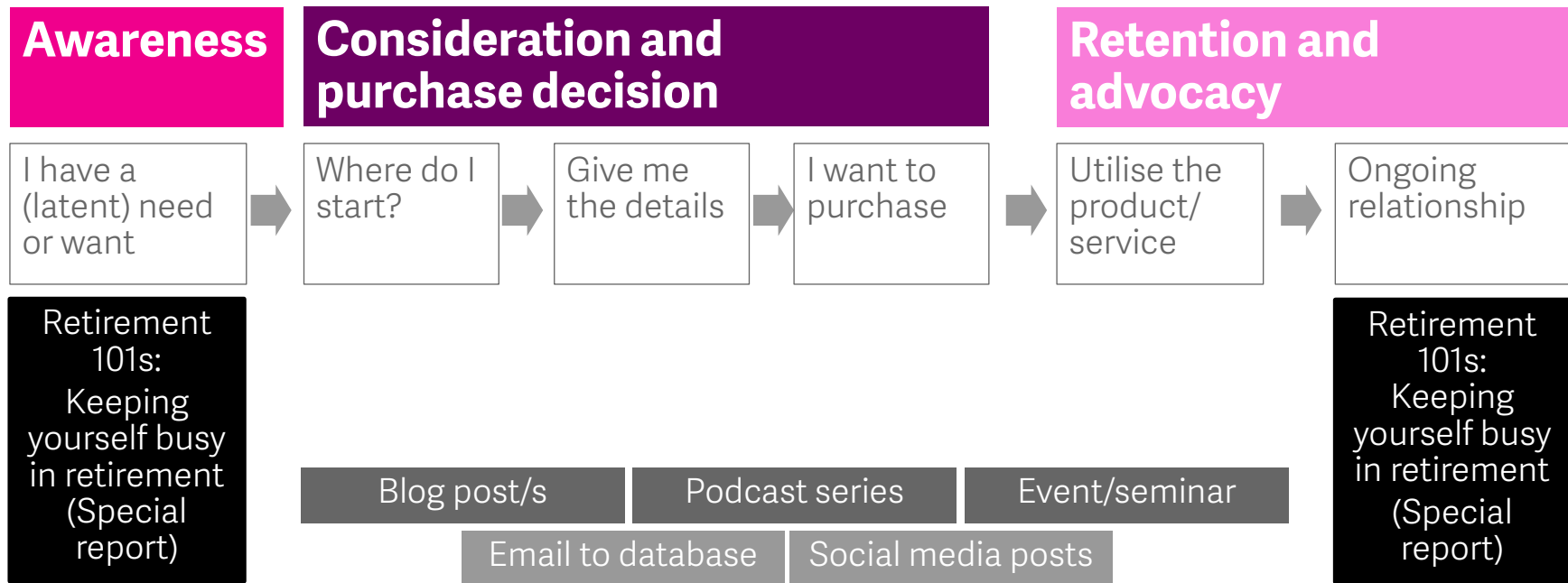
- Work with referral partners to co-create content
- Use images as many people learn by seeing
- Consider video & audio as companion pieces to written word
- Have high production values, but they don't need to be "Hollywood"
- Build a content schedule

There are plenty of great free and low cost tools:

- Canva for graphic design
- iStock for low cost images
- Fiver / Upwork / Freelancer.com for designers and freelance journalists
- Grammarly to check your spelling and grammar
- Zoom for webinars



Content as your new marketing strategy



“If your stories are all about your products and services, that’s not storytelling. It’s a brochure. Give yourself permission to make the story bigger.”

– Jay Baer

The first 100 days



Customers can be lost in the first 100 days...

Buyers remorse is the sense of regret after having made a purchase, that often arises when a person must make a difficult buying decision.



The power of gifts

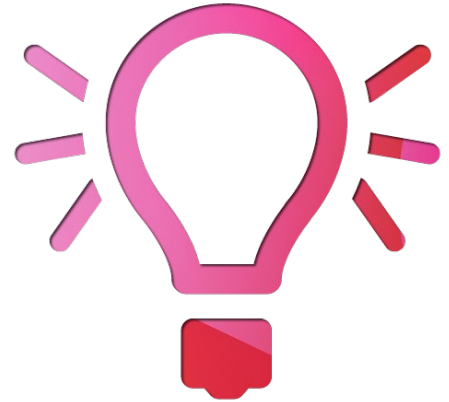
“When you act generously, people take notice. They’ll begin to feel appreciated, and in turn, they’ll want to pay it forward. It’s a natural inclination for us to want givers to succeed because we can appreciate the generosity that was shown to us.”

- John Ruhlin, Giftology



Tips on gifting

- Gifts are symbols of the value you place on the relationship
- Find out what matters to your client through your initial meeting/s
- Surprise and delight the client with a unique and personal gift
- The gift does not have to be expensive, in fact the more expensive the gift is, arguably the less personal it is
- You don't have to give a gift to everyone, so target the clients that you think will give you the largest lifetime value
- The way you deliver the gift is just as important as the gift itself



An example 100-day plan

Month 1

- Initial meeting/s
- SOA presentation
- **Welcome pack**
(handwritten note, welcome video from owner, personalised gift)

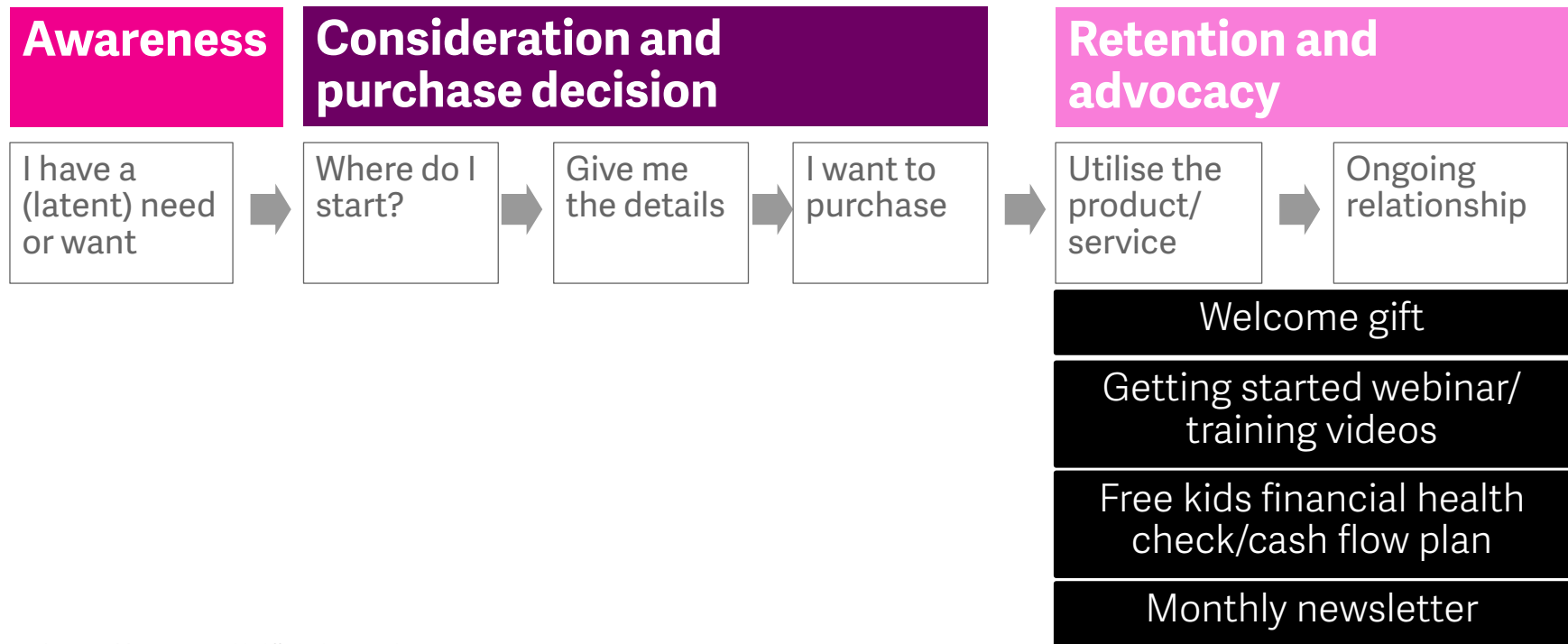
Month 2

- Implementation meeting/s
- **Getting started webinar, video/s**
(training for online tools)
- **Monthly newsletter**
(including news and recent developments)

Month 3

- Progress update email (on implementation)
- **Meet the kids catch up / Free kids financial health check or cash flow plan**
- **Event (get to know the team)**, e.g. Retirement 101 webinar, economic update, estate planning tips
- **Monthly newsletter**

100 day plan as your new marketing strategy



Digital advertising

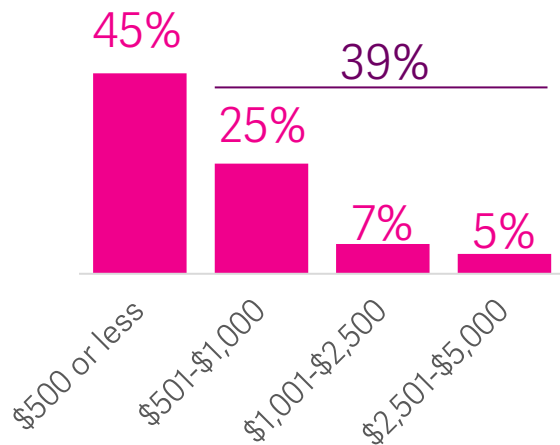


Online advertising

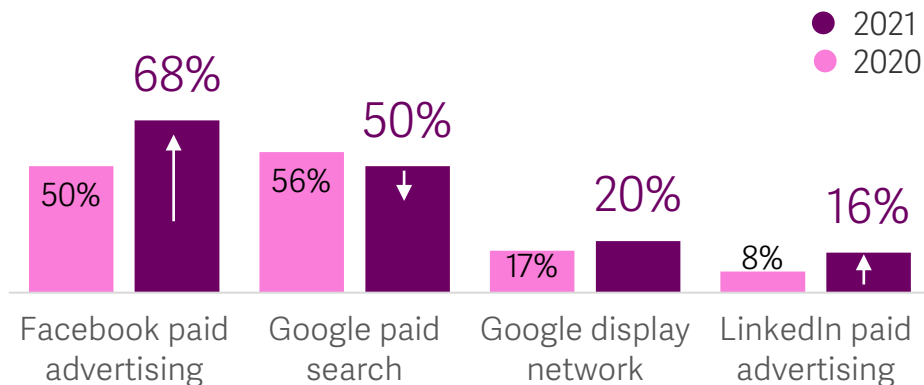
14%

Advertise online/mobile

Monthly spend



Most popular services



Facebook advertising

www.facebook.com/business

Create New ▾

Locations ⓘ Everyone in this location ▾

Australia

📍 Australia

📍 Include ▾ | Add locations

Add Bulk Locations...

Age ⓘ 18 ▾ - 65+ ▾

Gender ⓘ All Men Women

Languages ⓘ Enter a language...

Detailed Targeting ⓘ INCLUDE people who match at least ONE of the following

Demographics > Life Events

New job

Newlywed (1 year)

Add demographics, interests or behaviors

Demographics

Interests

Behaviors

More Categories

Connections ⓘ

Save this audience

Interests ⓘ

Business > Banking

Investment banking

Business > Personal finance

Investment

Search interests | Suggestions | Browse

Financial services +

Private equity +

Investor +

Stock market +

Investment management +

Value investing +


Financial market +

Online banking +

Real estate +

Banquer at home learning

To drive visitors and subscribers to the Banquer at-home learning program page by promoting the program to parents as a remote learning tool



Primary
For primary & intermediate schools


High
For secondary schools


English ▾ Case Studies Pricing Contact


Sign In

Get started now

Fun and engaging activities to keep learning about money alive at home





Championed by 

At Banquer, we're all about preparing the next generation for their financial future. During this time of stress and uncertainty we want to make sure these lessons are easier than ever for families across Australia.

That's why we've developed a collection of activities for your child to use at home, largely self-directed. Over two weeks your kids will explore budgeting, financial risk, managing debt and more through our at-home resources. All resources have been developed to improve financial capability while having fun, keeping your kids productive at home.

10 activities sent directly to your inbox over two weeks

Prepare your kids for their financial future
...and keep them busy :)

First Name*

Type your first name

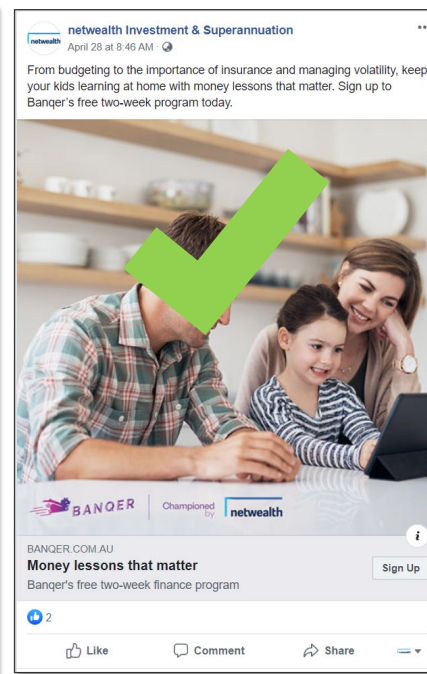
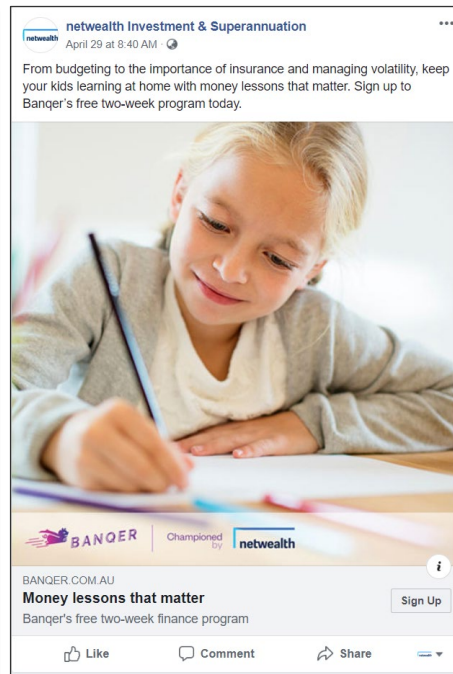
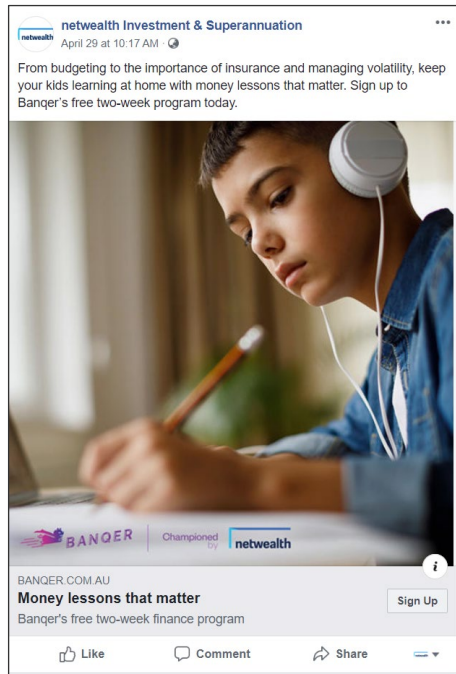
Last Name*

Type your last name

Email*

Type your email

Submit



1. Female, (NSW, SA, TAS, ACT or WA), Age: 28-45
2. ✓ Male (VIC, QLD or NT), Age: 28-45
3. Male, Australia, Age: 28-45
4. Netwealth followers

Measurable & transparent

- Total spend = \$3,500
- 360,417 people, viewed 1.1m ad impressions (avg frequency ~3)
- Resulting in 2,712 clicks
 - 0.26%, lower than industry avg of 0.58%
- At a cost of \$1.23/click
 - better than the average CPC of \$5.97
- 170 program sign ups (\$20 per sign up)



Paid search

<https://ads.google.com>

Paid results

Find a Financial Planner - btadviserview.com.au

Ad www.btadviserview.com.au/ ▼

Free initial consultation with a financial adviser. Request a call

Find A Financial Planner - Financial Adviser Doncaster - fpa.com.au

Ad www.fpa.com.au/find-a-planner ▼

Highly certified financial planners

CFP Professionals · Globally Certified · Trusted Advice · Find A Planner

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Ad www.resoluteprivate.com.au/ ▼

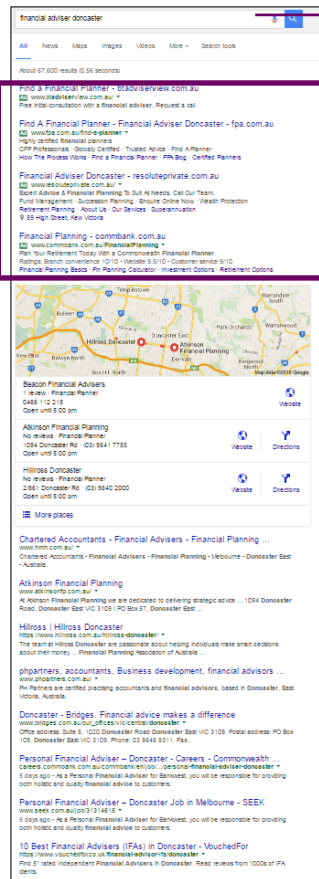
Expert Advice & Financial Planning To Suit All Needs. Call Our Team.

Fund Management · Succession Planning · Enquire Online Now · Wealth Protection

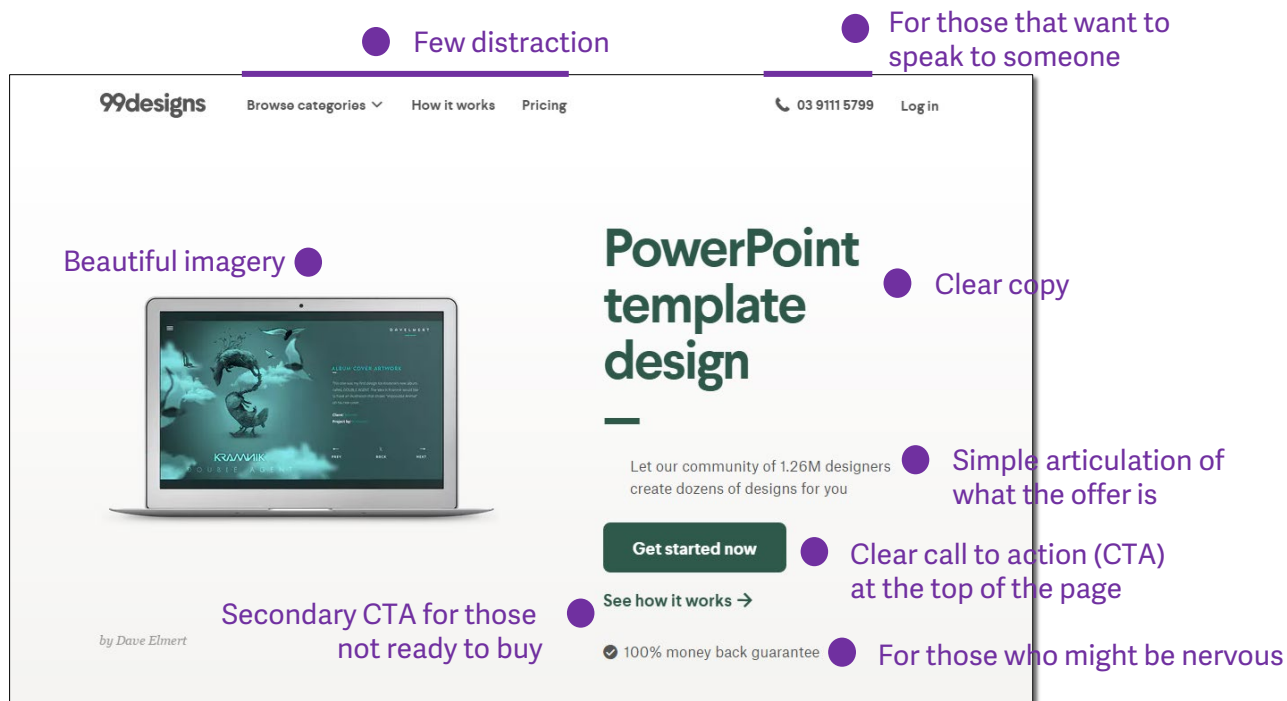
Retirement Planning · About Us · Our Services · Superannuation

📍 89 High Street, Kew Victoria

Search
= financial
adviser
Doncaster



Landing page optimisation

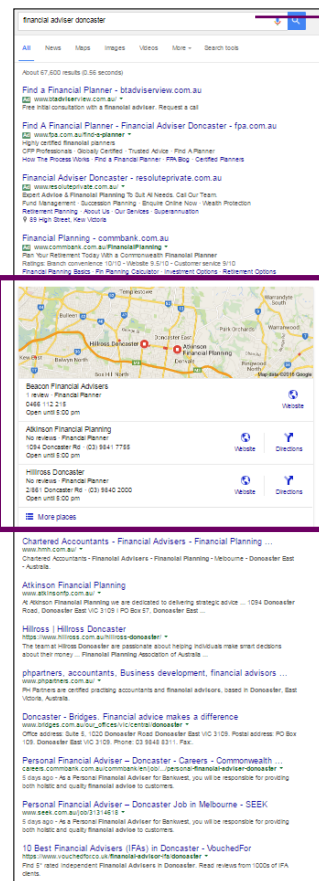
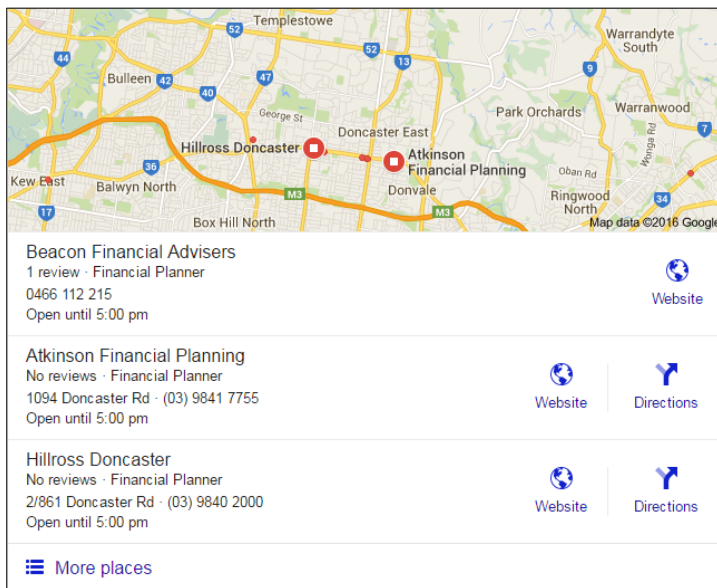


<https://99designs.com.au/powerpoint-template-design>

Local search listing

www.google.com.au/business/

Google search / Google maps



Search
= financial
adviser
Doncaster

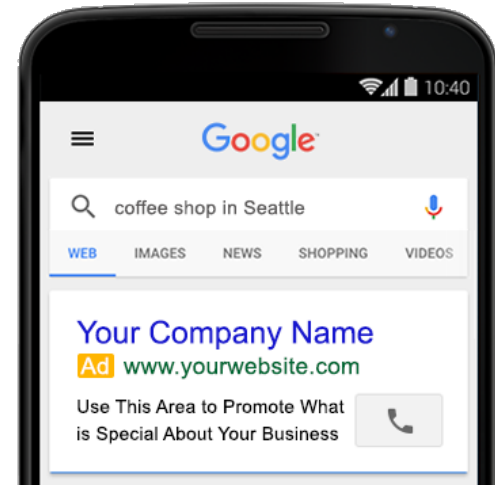
Local listing success

<https://support.google.com/business/answer/7091?hl=en>

How google determines local ranking

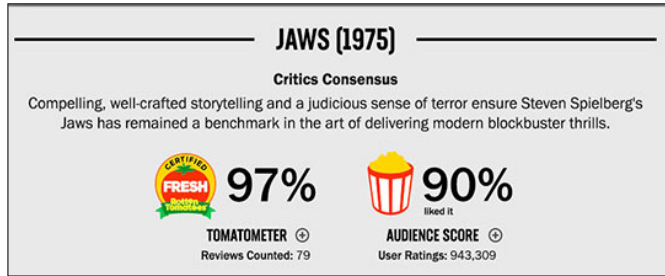
- Relevance
- Distance
- Prominence

1. Have a Google listing in the correct category, location/s. Add description and photos.
2. Make sure your business details (i.e. name, address, phone number) are consistent on your website and across the web.
3. Make sure your website is mobile friendly and information is easy to find on your website.
4. Get loads of reviews from your customers on Google, Facebook, Adviser Ratings, etc. Make sure they are substantial, diverse, frequent. Always respond.
5. Get plenty of Facebook likes, Twitter followers, etc.
6. List on other directories, such as Adviser Ratings.

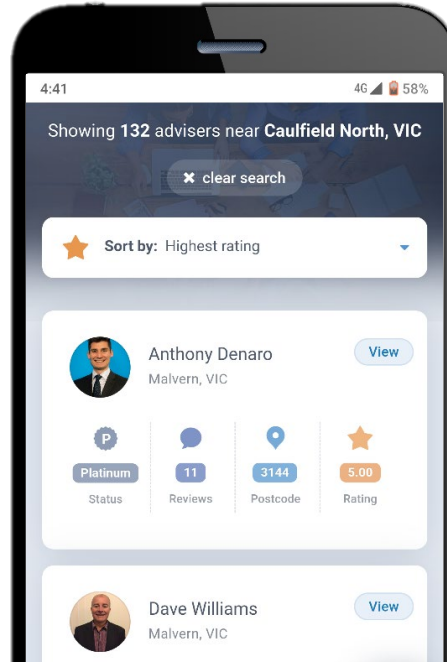


Your online reputation

Rotten Tomatoes



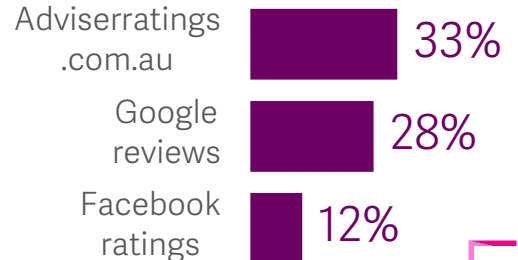
Adviser Ratings



44%

use tools to collect & publicly display customer feedback

2021 AdviceTech Report





Retargeting

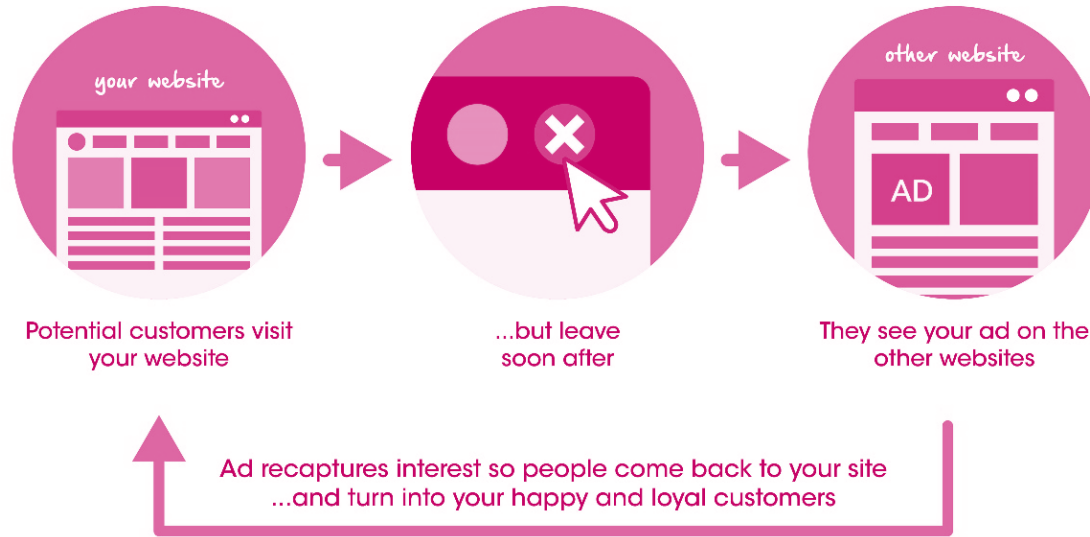
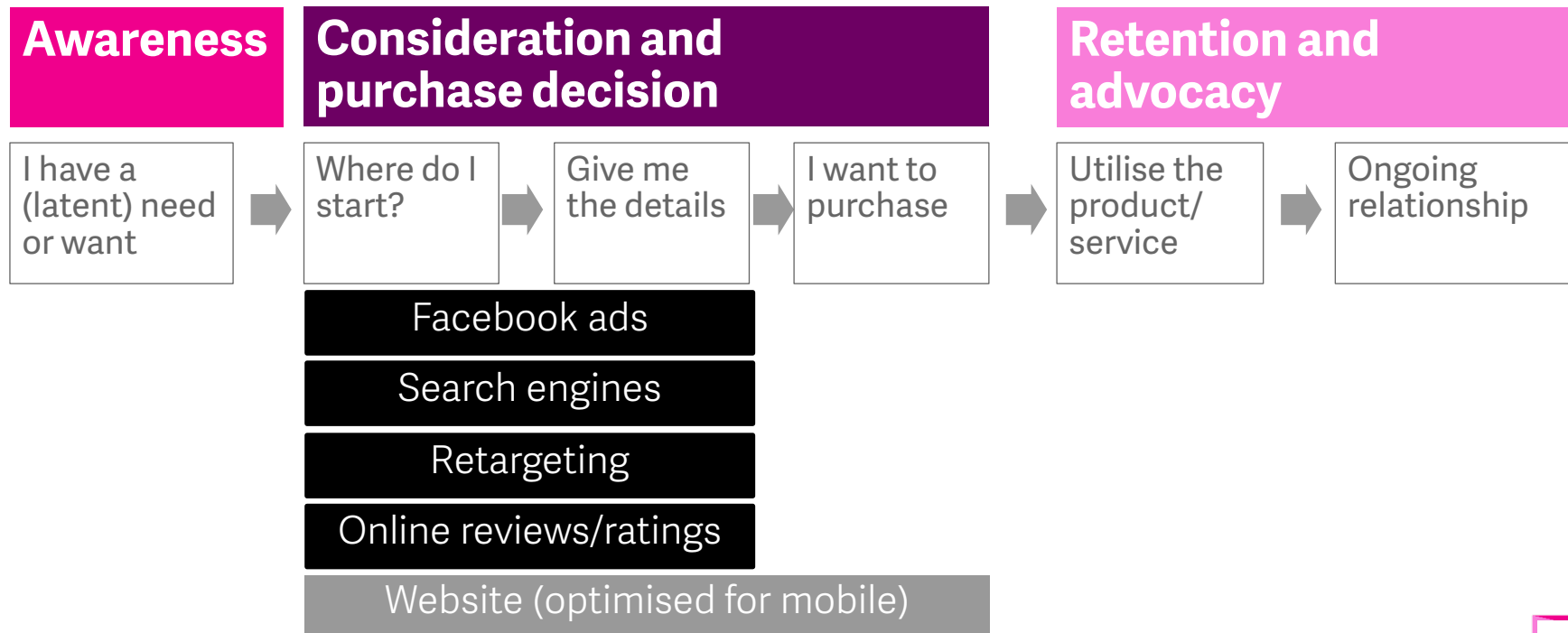


Image source: <https://www.agentdrive.com>

Technologies

- Google display advertising
- Facebook retargeting
- LinkedIn retargeting

Digital marketing as your new marketing strategy



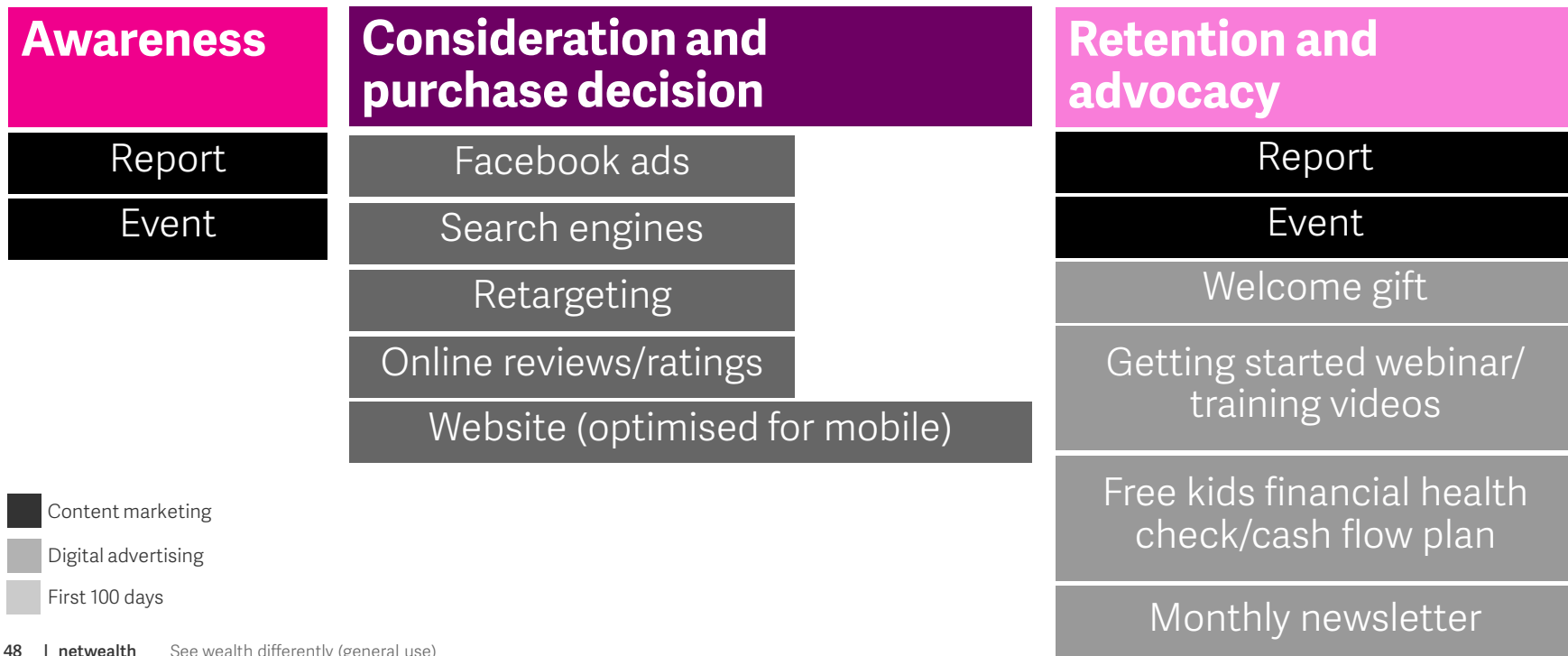
“Marketers need to build digital relationships and reputation before closing a sale.”

–Chris Brogan, Chief Executive Officer of Owner Media Group

**Bringing it
all together**

Your new marketing strategy

Content + Digital advertising + The first 100 days



Your new marketing business strategy

Content + first 100 days + Digital advertising

Awareness

Report

Event

- 250 downloads of report p/qtr
- 25 prospects attend event

Consideration and purchase decision

Facebook ads

Search engines

Retargeting

Online reviews/ratings

Website (optimised for mobile)

- 10% increase in website visitors (quarter on quarter)
- 10 inbound enquiries per month
- 30 new initial meetings per quarter
- 5% convert initial meetings to clients

Retention and advocacy

Report

Event

Welcome gift

Getting started webinar/ videos

Free kids financial health check

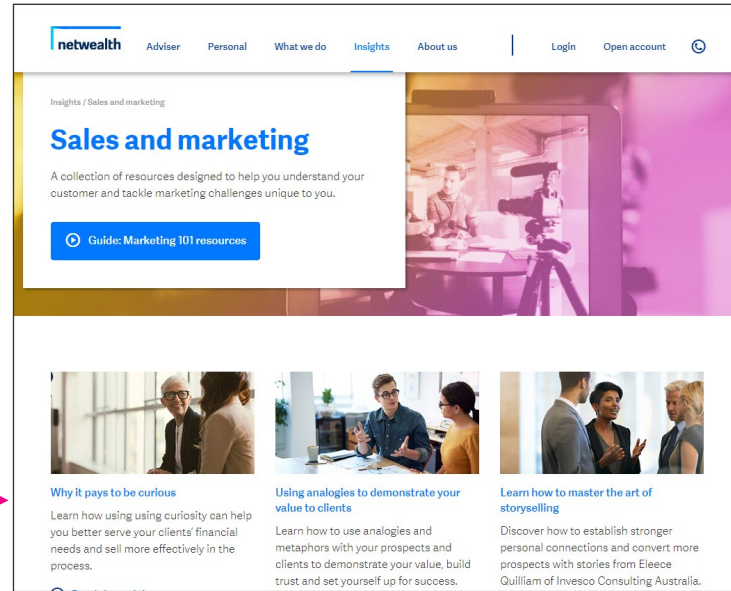
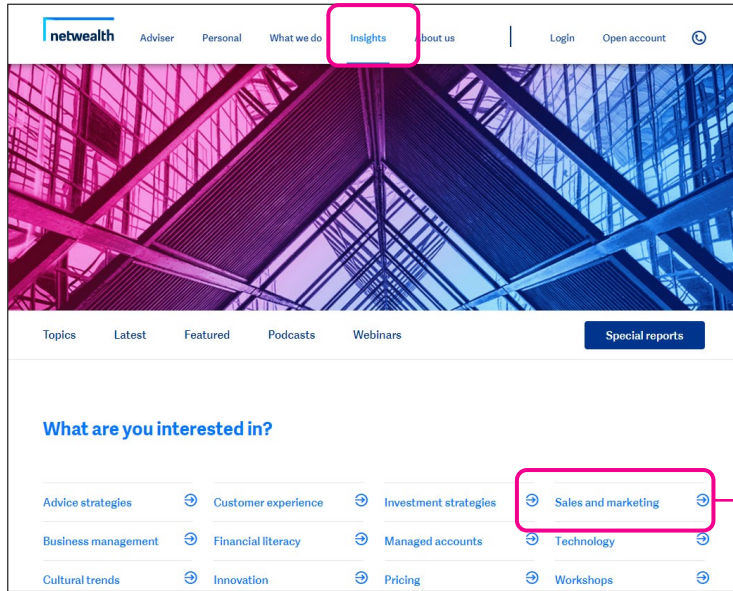
Monthly newsletter

- 15% increase in avg. revenue/client
- 10% reduction in lost clients
- 10 referrals from existing clients per quarter

“The cost of being wrong is less than the cost of doing nothing.”

- Seth Godin

Thank you



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