

INTRO

Chapter 1: Introduction to Social Media in Finance

The Digital Revolution in Financial Advising

In the constantly evolving landscape of the financial industry, the emergence of social media has marked a revolutionary shift in how financial advisors interact with their clients and market their services. As we step into 2024, the digital footprint of financial advisors is no longer just an optional marketing strategy but a fundamental aspect of business growth and client engagement.

Why Social Media?

Social media platforms have transformed from mere networking sites into powerful tools for financial professionals. They offer a unique opportunity to reach a broader audience, establish thought leadership, and build stronger client relationships. In this fast-paced digital era, a well-structured social media presence is crucial for staying competitive and relevant.

Targeting the Right Audience

For financial advisors, social media is not just about being present online; it's about strategically engaging with the right audience. Whether it's Millennials planning their first investments or Baby Boomers seeking retirement advice, each demographic requires a tailored approach. This guide aims to provide financial advisors with the knowledge and tools to identify and effectively engage their target audience through various social media channels.

Navigating Compliance and Building Trust

Navigating the regulatory landscape and maintaining compliance on social media can be challenging for financial advisors. This guide acknowledges these challenges and offers strategies to balance compliance with compelling content creation. Building trust through social media, while adhering to industry standards, is a fine art that this guide will help you master.

What to Expect from This Guide

"DIY Social Media Mastery Guide for Financial Advisors (2024)" is designed to be your comprehensive roadmap in harnessing the power of social media. From understanding the role of social media in today's financial industry, crafting compelling offers, to employing advanced techniques like AI and video content, this guide covers it all. Each chapter is structured to provide actionable insights, backed by research, case studies, and best practices tailored for the financial industry.

As you embark on this journey to social media mastery, remember that the landscape is always changing. What remains constant, however, is the need for authenticity, valuable content, and a customer-centric approach. Let's dive into the world of social media and transform the way you connect, engage, and grow your financial advising business.

Chapter 2: Understanding Your Social Media Goals

Getting Straight to the Point: What's Your Social Media Aim?

Let's get real about social media. It's not just about posting cool stuff and getting likes. For financial advisors, it's about having a clear plan. What do you want to achieve with social media? Maybe you want to find new clients, keep the old ones informed, or show off your financial wisdom. Whatever it is, you need to know your target.

Setting Goals: It's Like GPS for Social Media

Think of setting social media goals like using a GPS. You need to know where you're going. Are you aiming to get more clients to know about you (that's awareness)? Or, do you want them to think about using your services (consideration)? Or better yet, are you trying to get them to actually use your services (conversion)? Each goal needs a different approach, just like different destinations need different routes.

Your Business Goals and Social Media: They Should Match

Your social media goals should line up with what you want for your business. If your business goal is to bring in more young adults as clients, your social media should be all about reaching those young adults. It's like making sure the pieces of a puzzle fit together.

Research Says It's Important

You don't have to take just my word for it. Research in digital marketing says that setting clear goals is key to success. One study shows that knowing your objectives and tailoring your social media to these can boost your business results big time. It's like having a secret weapon in your back pocket.

Keep It Real and Reachable

Make sure your goals are realistic. If you're just starting, don't aim to be the next big influencer overnight. Set goals you can actually reach. Then, as you grow, set bigger goals. It's like leveling up in a video game.

Track Your Progress

Finally, keep an eye on how you're doing. Are you getting closer to your goals? If something's not working, don't be afraid to change your plan. It's all about staying flexible and learning as you go.

In short, know what you want from social media, make sure it helps your business, and keep it real. That's the winning recipe for social media success!

THE FUNNEL BREAKDOWN

Chapter 3: The Traditional Marketing Funnel in Social Media

What's a Marketing Funnel? Let's Break It Down

Imagine you're at a water park. You see that giant funnel slide? That's kind of what a marketing funnel is like in social media, but instead of water, it's your potential clients sliding down. It's a way to understand how someone goes from just hearing about you to becoming a loyal client.

Top of the Funnel: Catching Their Eye

At the top of the funnel, it's all about getting noticed. You want to grab the attention of potential clients. It's like waving a big, shiny sign that says, "Hey, look over here!" On social media, this means creating posts that are interesting and shareable. Maybe you share some quick financial tips or an eye-catching infographic about saving money.

Middle of the Funnel: Keep Them Interested

Now that you've got their attention, you need to keep them interested. This part of the funnel is about making them think, "Hmm, this financial advisor knows their stuff." You could share more detailed posts, like an article about retirement planning or a video explaining stock market basics. It's about showing your expertise and making potential clients feel like they can learn a lot from you.

Bottom of the Funnel: Time to Commit

You've caught their eye, you've kept them interested, and now it's time to reel them in. At the bottom of the funnel, your goal is to turn those interested folks into real clients. This could be through a call-to-action in your posts, like inviting them for a free consultation or offering a downloadable guide in exchange for their email. It's like saying, "You've seen what I can do, let's work together."

Leveraging the Funnel for Client Acquisition

For financial advisors, understanding this funnel is super important. Social media can be a powerful tool to draw in new clients, but you've got to use it right. Start with eye-catching content, then show off your knowledge, and finally, make the ask. It's a smooth journey from "Who's this?" to "I want this advisor managing my finances!"

Let's break it down further:

Chapter 4: Steps of the Funnel: Awareness, Consideration, Conversion

The Three Big Steps: Awareness, Consideration, Conversion

In the world of social media marketing, there are three main steps in the funnel: Awareness, Consideration, and Conversion. Think of them as the three main levels in a video game, each with its own challenges and goals.

Level 1: Awareness - "Hey, I Exist!"

This is the first level where you make your grand entrance. Your goal here is to get people to know you exist. It's like stepping onto a stage and getting the spotlight. In social media terms, this means creating posts that are easy to notice and remember. Share fun facts about finance, eye-catching graphics, or quick tips. You want people to see these posts and think, "That's interesting! Who is this?"

Key Tactics for Awareness:

- Use bright, attention-grabbing images.
- Share short, snappy financial tips.
- Use hashtags to reach a wider audience.

Level 2: Consideration - "Here's Why I'm Awesome"

You've got their attention, now it's time to show them what you can do. In the Consideration stage, your potential clients are thinking, "Okay, I know you exist, but why should I care?" This is your chance to showcase your expertise. Share deeper content like blog posts on financial planning, videos explaining complex financial concepts, or case studies showing how you've helped others.

Key Tactics for Consideration:

- Share educational content that shows your knowledge.
- Post client testimonials and success stories.
- Engage with followers by answering their financial questions.

Level 3: Conversion - "Let's Work Together"

This is the final boss level. Here, you want to turn those interested folks into actual clients. It's time for the big ask. Share posts that encourage people to take action, like scheduling a consultation with you, signing up for a webinar, or downloading a guide from your website. Make it easy for them to take the next step in working with you.

Key Tactics for Conversion:

- Include clear calls-to-action in your posts.
- Offer something valuable, like a free consultation or a financial planning guide.
- Make it easy to contact you – include links and contact info in your posts.

Chapter 5: The Master Funnel: Our tried-and-tested funnel on steroids.

The traditional funnel breaks the cycle into 3 parts: Awareness, Consideration and Conversion.

That's cool - but to someone who's never built and tested a funnel, each step can be very vague. That's because each stage of the funnel is broken down into smaller steps, each with their own "actions" being taken by the potential client or lead.

We broke down the funnel into 12 steps, and highlighted the key actions or touchpoints that a lead will engage with at each level.

Each step represents the MAIN goal that you should aim for. Study the funnel on the next pages, print it and stick it to your pin board.

1. Get eyes on your content/brand

ORGANIC:

- Social Media Content Channels
- SEO Articles on blog

PAID:

- Ads, boosted posts, paid PR, cold outreach



2. Get people to engage with content

Like, comment, share, save OR watch the whole video (attention)



3. Get people to follow your brand

Follow, Subscribe



4. Get 14-21 interactions with followers

Post regularly (1-2 times a day if you are posting on multiple channels, more if you are posting on one channel!)



5. Get followers to take action

Call to action -> Visit Landing page, visit offer, Send a DM, Book a call etc...



6. Reward follower for taking action

Deliver lead magnet, free discovery call, free guide, quiz with personalized result, video, education, newsletter, free trial etc...



7. Develop & Nurture relationships with qualified leads

Email, personal video, personal message,
DM, text-message, Event, Webinar, Community



8. Dismantle objections of qualified lead

Sales Call, Demo, In-person meeting



9. Qualified Lead decides to make first commitment/purchase

Closing Call



10. Make the customer your loyal fan

Welcome package, onboarding, quick wins,
timely reporting.



11. Take customers to the next step on the value ladder

Upsells, cross-sells, down-sells, longer contract,
base + commission.



12. Retain client and increase Life Time Value

Customer support, stellar results, Customer appreciation,
private events, free addons, CUSTOMER SUCCESS!

THE OFFER

Chapter 6: Crafting a Compelling Offer for Your Audience

Unlocking the Secret to Irresistible Offers

In the bustling world of social media, standing out is crucial, especially for financial advisors. Your offer is more than just a service or product; it's the golden ticket that grabs attention and sparks interest. Let's dive into how to craft an offer that your audience can't resist.

1. Understanding Your Audience's Needs

Before you even start crafting your offer, you need to get into your audience's shoes. What are their financial goals and challenges? Are they looking to retire early, save for their kids' education, or manage their wealth more effectively? Knowing this allows you to tailor your offer to meet their specific needs. It's like being a chef who knows exactly what their customer craves.

2. The Power of Value

Your offer should scream value. But here's the catch – value doesn't always mean the lowest price. It's about what your audience gets out of it. Maybe it's peace of mind knowing their finances are in good hands, or the excitement of seeing their wealth grow. Your offer should make them think, "Wow, I need this!"

3. Clear and Simple Wins the Race

In the world of social media, clarity is king. Your offer should be easy to understand at a glance. Avoid jargon and complex terms. Keep it straightforward – "Free Initial Financial Health Check" sounds much more inviting than "Complimentary Initial Consultation on Financial Wellness."

4. The Urgency Factor

Creating a sense of urgency can encourage quicker decision-making. Limited-time offers, exclusive deals for the first X number of clients, or a special discount for early birds can create a sense of scarcity and prompt action. It's like having a limited amount of your favorite dessert left – you want to grab it before it's gone!

5. Sell the Vacation: Delivering the Dream

When crafting your offer, it's not just about the journey; it's about the destination. The ultimate outcome – that's the sweet fruit of your program. This is about tapping into what your clients really desire, what keeps them up at night, and what dreams they have for their financial future.

Think about it: what does your lead wake up at 3 AM worrying about or hoping for? Is it the fear of not having enough for retirement? The dream of a comfortable, worry-free life after they stop working? Your offer should speak directly to these deep-seated desires and needs.

It's not just about "Comprehensive Retirement Planning"; it's about "Securing a Future Where Every Day Feels Like a Vacation." It's not just investment management; it's "Creating Wealth That Lets You Live the Life You've Always Dreamed Of." Your service is the path, but your offer needs to focus on the destination – a future where their worries are taken care of, and their dreams are within reach.

Remember, people don't buy products or services; they buy outcomes and experiences.

6. Testimonials and Social Proof

The power of testimonials and social proof in building trust cannot be overstated. When potential clients see others – especially those they can relate to – benefiting from your services, it significantly boosts your credibility. It's human nature to be influenced by others' experiences. So, if you've helped John save for a comfortable retirement or assisted Sarah in navigating her investment portfolio, share these stories. Let your satisfied clients speak for you. It's like reading reviews before buying a product; people want assurance from others like them. Remember, a real story from a real client is worth more than any marketing copy you can write.

7. The Call to Action

A strong call to action is the final, crucial step in your offer. It's the signpost at the end of the journey telling your clients exactly where to go. Your CTA should be clear, urgent, and compelling. Use action words that evoke enthusiasm and readiness. Phrases like "Start Your Financial Journey Today" or "Unlock Your Financial Potential Now" create a sense of immediacy and possibility. Think of your CTA as a friendly guide, reaching out a hand and saying, "This way to a better future." It should be irresistible, something that nudges them from considering to taking action. Your CTA isn't just a button or a line of text; it's the bridge between their financial challenges and your solutions.

Chapter 7: Aligning Your Offer with Client Needs

In the bustling world of financial advising, one size does not fit all. Your offer should be like a tailor-made suit, perfectly fitting the unique needs of each client. This chapter dives into how you can align your offers with the specific demands of your clients, featuring real-life examples from the financial industry.

Understanding the Client's World

First, get to know your clients inside out – what are their financial goals, fears, aspirations? Are they looking to buy a house, save for their child's education, or ensure a comfortable retirement? Understanding these nuances helps you craft offers that resonate deeply with them. It's like being a financial detective, piecing together the puzzle of their needs.

Let's see how two big names in the financial advice world used their client's pain points to craft compelling offers:

A Note Before the Case Studies

Even if your services or values differ from these financial advisors, or you're not looking to model your practice after theirs, there's still much to learn from their success stories. The following case studies of well-known financial figures aren't just about their specific strategies or advice. They are exemplary models of how understanding and meeting client needs can lead to crafting powerful offers. Let's see how these principles have been successfully applied in the real world.

Case Study 1: The Debt-Free Blueprint

Dave Ramsey, a household name in personal finance, has successfully addressed a common and pressing issue: debt. His "Debt Snowball Method" offers a straightforward, step-by-step plan for those drowning in debt. The reason behind its wide acceptance isn't just the method itself, but how Ramsey tailored this solution to meet a specific, urgent need of his audience, offering clarity and hope.

Case Study 2: The Retirement Roadmap

Similarly, Suze Orman's approach to retirement planning stands out. Instead of offering generic advice, she provides customized strategies based on different life stages and financial situations. Her "Retirement Roadmap" gained popularity because it speaks directly to her clients' personal experiences and needs at various stages of their lives.

Chapter 8: A Surefire Formula to Craft a Million-Dollar Offer

Crafting a million-dollar offer isn't just about having a great service. It's about how you package and present it. Let's break down a surefire formula to create an offer that's irresistible to your clients, with a focus on financial advising.

1. Campaign Goals

Start by defining your campaign goals. Ask yourself: What service do I offer? Who is it for? How much will it cost? How long will it take to deliver results? And importantly, what catchy name can I give my service?

Example: Service: Retirement Freedom Plan. Target Audience: Individuals aged 40-55. Price: \$2000. Delivery Time: 3-month plan. Name: "The 3-Month Freedom Sprint."

2. Avatars

Create avatars, which are detailed descriptions of your ideal clients. Think about their demographics, interests, financial situations, and goals.

Example: Avatar 1: Jane, a 45-year-old corporate manager, looking to secure her financial future. Avatar 2: Mark, a 50-year-old small business owner, planning for a comfortable retirement.

3. Ideal Clients

Define your ideal client. Who do you want to serve? Equally important, identify who you cannot help and will reject.

Example: Ideal Client: "My ideal client is someone who is committed to securing their financial future and is proactive about retirement planning." Rejection Criteria: "I cannot help and will reject someone who is not serious about following the financial plan or is looking for quick, risky financial gains."

4. Currency Calculator

Determine the quantifiable benefits of using your service. What can your clients increase or get more of? What can they decrease or get less of?

Example: Increase: "Using my service will help clients increase their savings by 30%."
Decrease: "Using my service will help clients decrease their financial stress and uncertainty about retirement."

5. Core Currency

Identify the core currency of your campaign. What's the main metric of success? What result will your product help your customers achieve? What's the ultimate outcome?

Example: Core Currency: "The core currency for this campaign is increased retirement savings." Result: "My product will help my customers maximize their retirement funds." Ultimate Outcome: "My customers' ultimate outcome is achieving financial freedom and a worry-free retirement."

6. Core Problems

List the main struggles or obstacles that prevent your clients from achieving results on their own.

Example: Core Problems:

- Lack of knowledge in investment planning.
- Uncertainty in managing retirement funds.
- Anxiety about future financial security.

7. The Million-Dollar Offer

Using the information you've gathered, structure your offer.

Example Offer: “The 3-Month Freedom Sprint is a comprehensive retirement planning service designed specifically for individuals aged 40-55. It helps you increase your retirement savings by 30% in just 90 days, without the stress of handling complex investments or the uncertainty of future financial security, leading you to a peaceful and financially secure retirement.”

This formula, applied with the examples provided, can help you create an offer that not only resonates with your potential clients but also clearly articulates the value and outcome of your service. Remember, a great offer is the intersection of your expertise and your clients' needs.

SOCIAL MEDIA STRATEGY

Chapter 9: Choosing the Right Channels for Your Audience

When it comes to lead generation in financial advising, not all social media platforms are created equal. Each has its unique flavor and audience. Choosing the right one is like picking the right tool for a job. Let's break down the pros and cons of popular platforms and match them with your target demographics.

Instagram

Advantages: Highly visual, great for storytelling through images and short videos. Perfect for building a brand aesthetic and connecting on a more personal level.

Disadvantages: May not always reach the more mature audience typically interested in financial advising. It's more about appeal than in-depth content.

Best For: Targeting younger clients, especially millennials, who are starting to think about financial planning.

TikTok

Advantages: Excellent for reaching a younger demographic. Short, engaging videos can make complex financial concepts more digestible.

Disadvantages: Might not be the ideal platform for detailed, in-depth financial advice. More suited to creating brand awareness rather than converting leads.

Best For: Catching the eye of Gen Z and younger millennials. Great for building brand awareness and simplifying financial concepts.

LinkedIn

Advantages: Professional audience, perfect for B2B networking and establishing yourself as an industry expert.

Disadvantages: Less casual, might not be the best for light-hearted content. More about professional connections than personal stories.

Best For: Connecting with professionals and business owners who are serious about financial planning and investments.

Facebook

Advantages: Wide demographic reach, great for sharing a mix of content types – articles, videos, images. Excellent for community building.

Disadvantages: Organic reach can be limited without paid promotion. The audience may not always be looking for financial advice.

Best For: Engaging with a broad audience, including older demographics. Ideal for sharing informative content and building a community.

YouTube

Advantages: Perfect for in-depth content. Video format allows for detailed explanations and demonstrations. "Shorts" feature allows for engaging with audiences preferring shorter content.

Disadvantages: Requires more effort in content production. Not the best for quick interactions.

Best For: Sharing comprehensive financial advice and tutorials. Great for an audience seeking thorough understanding.

Twitter

Advantages: Quick updates, real-time engagement. Ideal for sharing industry news and short insights.

Disadvantages: Limited character count restricts depth of content. Fast-paced nature means content can get buried quickly.

Best For: Staying on top of current trends, engaging in industry conversations, and reaching an audience interested in up-to-date financial news.

Chapter 10: Content Buckets: Education (60%), Entertainment (10%), Conversion (30%)

To effectively engage and retain your audience, your content needs to be a well-balanced mix of education, entertainment, and conversion. Let's break down these content buckets and explore how to develop a diverse content strategy.

1. Education: The 60% Powerhouse

Education should form the lion's share of your content strategy, a whopping 60%. This is where you showcase your expertise, provide value, and build trust with your audience.

- **How to Do It:** Share financial tips, market updates, explainers on complex financial concepts, and insights into current economic trends. The goal is to make your audience smarter and more informed about financial matters.
- **Example:** A series of posts explaining retirement planning, an infographic on investment risk types, or a video detailing tax-saving strategies.

2. Entertainment: The 10% Spark

While education is crucial, a dash of entertainment can keep your audience engaged and lighten the mood. Allocate around 10% of your content to entertainment.

- **How to Do It:** This could be as simple as sharing a humorous take on financial news, a light-hearted anecdote, or celebrating a holiday or milestone with your followers. Remember, finance doesn't always have to be serious.
- **Example:** A funny meme about budgeting, a behind-the-scenes look at your office, or celebrating a client's financial milestone.

3. Conversion: The 30% Goal

Finally, 30% of your content should be aimed at conversion. This is your direct pitch to your audience to take the next step – whether it's signing up for a consultation, downloading a guide, or attending a webinar.

- **How to Do It:** Craft clear, compelling calls to action. Your conversion content should highlight the benefits of your services, offer solutions to your clients' problems, and make it easy for them to take action.
- **Example:** A post inviting followers to a free investment strategy webinar, a testimonial video with a strong CTA, or an exclusive offer for your financial planning services.

Balancing the Three Buckets

The key to a successful content strategy is balance. Too much of one type can make your social media presence feel one-dimensional. Regularly assess your content mix to ensure you're hitting the right balance.

- **Educational content establishes your authority and expertise.**

- **Entertaining content builds a personal connection and keeps your audience engaged.**
- **Conversion content drives your business goals and turns followers into clients.**

Remember, each piece of content, regardless of its primary bucket, should reflect your brand's values and contribute to a cohesive online presence

Chapter 11: Developing a Content Calendar: Frequency and Timing

Creating a content calendar is like setting up a roadmap for your social media journey. It's about planning your content strategically to ensure optimal engagement. Let's dive into how to develop a content calendar focusing on frequency, timing, and the best tools for the job.

1. Frequency: Finding the Sweet Spot

First, decide how often you should post. This depends on your audience, the platforms you use, and your capacity to create quality content.

- **For Financial Advisors:** A good starting point is 3-5 times a week on platforms like LinkedIn and Facebook, while Twitter and Instagram might require a bit more frequency due to their fast-paced nature.
- **Consistency is Key:** Regular posting keeps your audience engaged and your brand top-of-mind. Determine a frequency that is sustainable for you and stick to it.

2. Timing: When to Hit Publish

Timing is crucial in maximizing your content's visibility.

- **Research Best Times:** Each social media platform has peak times when users are most active. For example, LinkedIn typically sees higher engagement during weekdays, especially in the morning and midday for professionals.
- **Test and Learn:** Start with suggested peak times, but also test different posting times to see what works best for your specific audience.

3. Planning Ahead: The Content Calendar

A content calendar helps you organize and schedule your content efficiently.

- **Map Out Your Content:** Plan your posts around important dates, financial events, or holidays relevant to your audience. Include a mix of educational, entertaining, and conversion-focused content.
- **Include Flexibility:** While it's important to plan, leave room for spontaneous posts or last-minute changes based on current events or market news.

4. Tools for Content Calendars

Several tools can help you manage your content calendar:

- **Google Calendar:** Simple and free, great for beginners. You can set reminders and color-code different types of content.
- **Trello:** A flexible tool that offers a visual way of organizing your content with boards and cards.
- **Hootsuite or Buffer:** These tools not only help you plan but also schedule and automatically post your content across different platforms.
- **CoSchedule:** A more comprehensive tool, perfect for integrating your social media calendar with other marketing activities.

Chapter 12: Best Practices for Posting and Community Management

In the digital world of financial advising, your social media presence is more than just sharing posts – it's about creating a community and engaging with your audience. Let's explore the best practices for posting and managing your online community effectively.

Engaging with Your Audience

1. **Respond Promptly:** When someone comments on your post or asks a question, reply as soon as you can. Quick responses make people feel heard and valued. It's like answering a phone call instead of letting it go to voicemail.
2. **Be Genuine:** Your replies should be authentic and personal. Avoid using too many generic responses. It's like having a real conversation instead of just repeating scripted lines.
3. **Ask Questions:** Encourage engagement by asking questions in your posts. It could be about their financial goals or opinions on a recent market trend. This is like starting a friendly chat rather than just giving a lecture.
4. **Share User-Generated Content:** If a client shares a positive experience with your service, ask if you can repost it. This not only shows appreciation but also adds to your credibility.

Building a Community

1. **Regular Interaction:** Consistently interact with your audience. Regular interaction can be through weekly Q&A sessions, live discussions on financial topics, or interactive polls.
2. **Create Exclusive Groups:** Consider creating exclusive groups on platforms like Facebook or LinkedIn. These can be spaces where clients and prospects can discuss financial matters, share insights, and receive exclusive content from you.
3. **Highlight Clients:** With permission, share success stories or milestones of your clients. This not only showcases your impact but also makes your clients feel special and valued.
4. **Educational Webinars/Events:** Host webinars or live events on topics like financial planning, investment strategies, or market analysis. This not only positions you as an expert but also fosters a sense of community learning and sharing.

5. **Consistent Brand Voice:** Maintain a consistent tone and style in your posts. Whether it's friendly, professional, or a mix of both, a consistent voice helps in building a recognizable brand personality.
6. **Monitor and Moderate:** Keep an eye on the conversations happening in your community. Make sure discussions are respectful and on-topic. Moderate any inappropriate content to maintain a positive environment.

CONTENT CREATION, DISTRIBUTION & REPURPOSING

Chapter 13: Create Mouthwatering Content With Ease

Being a financial advisor on social media and making exciting content needs a mix of creativity, good planning, and using tools in the right way. We'll explain how to make your content-making process smoother and more effective.

1. Using Tools to Make Content Easily

- **Tools for Graphic Design:** You can use platforms like Canva or Adobe Spark to make good-looking graphics easily. They have ready-made templates for things like infographics and social media posts, which can save you a lot of time.
 - *Tip:* Change the templates to match your brand's colors and style to make your brand consistent.
- **Software for Video Editing:** Videos can be very engaging. Tools like InShot for mobile or Adobe Premiere Rush for desktop make editing easy. You can add text, cut out parts, and put in transitions without needing a lot of skills.
 - *Tip:* Make your videos short and to the point to keep your viewers interested.
- **Content Management Systems:** Tools like Hootsuite, Buffer, or CoSchedule aren't just for scheduling posts. They also have analytics to help you see how well your posts are doing and understand what kind of content your audience likes.
 - *Tip:* Use the analytics to improve your content strategy based on what works best.

2. Coming Up with and Improving Ideas

- **Mind Mapping:** Start with a main idea related to financial advising and expand into subtopics. This could be things like planning for retirement, investment strategies, tax

advice, etc. Mind mapping helps you organize your thoughts and find connections you might not have noticed before.

- **Stay Informed:** Regularly read financial blogs, newsletters, and news sites. Keeping up with the latest news and trends can help you come up with content that is informative and timely.
- **Feedback Loops:** Talk to your audience to understand what they're wondering about and what they're worried about. Use their feedback as a direct source of inspiration for new content.
 - *Tip:* Regularly ask your audience what they want to learn about through polls or direct questions.

3. Finding Inspiration the Right Way

- Look at the successful posts of your competitors or industry leaders. Notice the format, tone, and type of content that gets the most engagement. Adapt these insights to fit your unique voice and audience.
 - *Tip:* Inspiration should spark originality, not imitation. Always add your unique perspective or twist.

4. The Content Creation Funnel

- **Ideation:** Use tools like Trello or Evernote to write down and organize your ideas. Having a central place for your ideas can make the planning process smoother.
- **Refining:** Evaluate each idea against what your audience is interested in and what your business goals are. Not all ideas will work, and that's okay.
- **Scripting:** This is especially important for video content. A well-planned video makes sure you cover all the main points clearly and concisely.
- **Creating:** Spend time at this stage to make sure the content is engaging, useful, and looks good.
- **Posting:** Use scheduling tools to post at times when your audience is most active. Think about time zones if you have a wide audience.
- **Testing:** Use social media analytics to understand engagement patterns. Which types of posts get the most likes, comments, or shares?
- **Recreating:** Focus on creating more content similar to your best-performing posts. This is about focusing on what works.

5. Quality vs. Quantity

- While it's important to post regularly, never compromise on the quality of your content. High-quality content makes you look credible and knowledgeable.
 - *Tip:* Always prioritize content that is valuable to your audience. It's better to post two high-quality pieces per week than daily posts that don't engage your audience.

You can also leverage the power of A.I. to create engaging content for your target audience. There's a correct way to do it and a wrong way to it (most people fall for the second one). But we'll dive deeper into A.I. in a few chapters.

Chapter 14: Repurposing Content for Different Platforms - How to Turn 1 Media Piece into 30 Different Pieces of Content

In the realm of financial advising on social media, creating a constant stream of content can be daunting. However, repurposing a single piece of content into multiple forms can significantly streamline your content strategy. Let's explore how to adapt and extend the life of your content across various platforms.

1. Adapting Content for Various Social Media

- **Understanding Platform Strengths:** Each social media platform has its own strengths and preferred content types. A comprehensive video on YouTube can be transformed into a series of shorter clips for Instagram Stories or a detailed thread on Twitter.
- **Break Down and Build Up:** Consider breaking down a long-form blog post or video into smaller, digestible pieces of content. Each section or key point can become a standalone post for platforms like LinkedIn or Facebook.

2. Reposting with Slight Variations (A/Z Testing)

- **Tailoring the Message:** When reposting content, slightly tweak the message or angle to test what resonates best with your audience. This is not just copying and pasting; it's about re-angling your content to fit different audience segments or times.
- **Visual Variations:** Change the visuals or the format of the content. For example, turn a quote from a video into a graphic for Instagram, or vice versa.
- **Timing and Frequency:** Experiment with posting at different times and frequencies to gauge when your content performs best across different platforms.
- More on testing and reposting below:

3. The Mass Content Creation and Repurposing System

1. Research + Analytics

- This is where you gather inspiration and insights/data on what kind of content you should be making.
- Some ways to conduct research: SEO, VideoSEO, Audience, Competition, past content, trends, offers, social channels analytics, market, funnel, content champions, client pain-points.

1. Mass Brainstorming

- Based on the insights and research, you start brainstorming A LOT of ideas. Typically, for every 10 ideas, you will get 1 winner idea that will make a great piece of content.
- Start with Divergent thinking: Set a timer for 12 minutes. Your goal is to write as many ideas as you can, without self-censoring. No idea is a bad idea at this stage. Aim for

quantity, not quality. This part is usually done best individually, as people tend to be more inhibited when coming up with ideas out loud in groups.

- Finish with Convergent thinking: Set another 12 minute timer and ruthlessly discard any idea you don't feel excited about. Focus on quality: original, valuable, novel content that fits your message and resonates with your audience. This activity is best done publicly with a group. The ideas can be "anonymized" to make it easier.
 - You can then plug the ideas into ChatGPT and prompt it to develop 15 more. Remember: don't copy and paste, make sure you edit each idea to fit your goals and brand.
1. **Create Long Form Content (10-90mins video or 1000+ Words)**
 - This step is not necessary, but definitely recommended. People that are big fans of yours LOVE long form content because they can't get enough of you and your advice. Plus, this long form content will come in handy in just a second.
 - Some long form content ideas: Podcasts, interviews, Blogs, Books, Courses, Advertorials, White papers.
 1. **Break Long Form into Medium Form (3-5 minutes, 300-600 words) + Repurpose.**
 - Hidden within your long form content are medium-sized pieces of content that are shorter and more concise. They usually cover a single topic in depth and can be highly educational. Although most people have a short attention span, if you have a good hook every minute of the video, they will keep watching. Same for text: if the first line of every paragraph hooks the reader, they will consume your longer form text.
 - Cut long form content into medium sized clips, Blogs, Linked In Articles, longer Linked In Posts, threads on X, carousels, newsletters, guides.
 1. **Break Medium Content into Short Form + Repurpose**
 - The "gems" in the content world right now are found in short-form content. Before deciding whether or not they want to invest their time and attention in you and your company, people watch your short form content. You have less than 3 seconds to hook them, and less than 30 seconds afterwards to deliver value. Short form video content is the best chance you have to connect with potential leads, as it is the most consumed content on the internet to date.
 - Cut medium clips and turn them into: Shorts, Reels, Linked In clips, TikToks, micro-blogs, micro-podcasts, Linked In posts, X threads or posts, short carousels, single static content.
 1. **The Magic: Reposting + Testing.**
 - Look, if you are lucky, 10% of your entire audience will see each piece of content you post. Yet most people are afraid of reposting because they don't want people to find out. Guess what! They won't. I will go as far as to say, that you should repost the EXACT same piece of content, with the same caption, content and branding THREE times a month.
 - Then, you want to take that piece of content and change out one variable at a time and then repost it. That's called testing. Here's a few variables I encourage you to change and test:
 - Caption
 - Title

- Thumbnail
 - Design, Color, Style
 - Phrasing/copy
 - Hook
 - Time/Day of posting
 - Target audience mentioned
 - Video length
 - Text length
 - Video speed
 - Call to action
 - Hashtags
 - Platform
 - Geotag
 - Structure
- This will give you so much content you will never run out of posts again. AND in the process, you will learn exactly what elements make up successful content. Win-win.
1. **Identify Evergreen Champions**
 - These are your best performers, based on analytics (more on analytics later in the guide). Each month, quarter and year, you should look at every platform and find the top 3-5 best performing posts. Those are going to be your Champions.
 - Best performing idea/concept
 - Best performing content on each platform
 - Best performing platform
 - Best content for engagement
 - Best in show content (most views, engagements, leads generated)
 1. **Repurpose + Repost Champions Every Week/Month**
 - Take your champs and reformat, repurpose and repost them often.
 - Test them against your other content.
 - Optimize them. Yes, you can make the best even better. Look for ways to improve your best content even more. This can take you from 10,000 views to 1 million views.
 1. **Develop Long Form Content Based on Champions**
 - That's right, we are reversing the order. We are taking short-form content that performed well and expanding it into long form content. If people resonated with a 60 second clip, they are most likely interested in the idea you are presenting and would value a deeper dive.
 - Take your champs and turn them into:
 - Podcasts
 - Courses
 - Lead Magnets
 - Articles
 - Advertorials
 - Series
 1. **Restart the Repurposing Cycle.**

- Congratulations! What you just completed is a thorough intelligence-gathering process that has also created LOTS of content for your social channels and marketing efforts. So now you can start over. Look at what worked and what didn't, and come up with new ideas.
- Remember: with each cycle and each test, you get closer and closer to "decrypting" what sort of content moves the needle for your goals.

4. Maximizing the Lifespan of Your Content

- **Evergreen Content:** Focus on creating evergreen content that remains relevant over time. This allows you to revisit and repurpose content long after its initial release.
- **Update and Refresh:** Periodically update your older content with new information, data, or perspectives. This not only refreshes the content but also demonstrates your commitment to providing current and accurate information.
- **Cross-Linking Content:** When creating new content, look for opportunities to link back to previous posts. This not only boosts SEO but also introduces new audience members to your older content.

HACKS TO OPTIMIZE CONTENT

Chapter 15: Creating Engaging Hooks

In the fast-paced world of social media, capturing your audience's attention quickly is crucial. As a financial advisor, your challenge is to make finance engaging and accessible. The key lies in crafting captivating hooks - the first few words or sentences that grab your audience's attention and compel them to keep reading or watching. Let's explore techniques and examples for creating effective hooks in finance.

1. Techniques for Capturing Attention

- **Start with a Question:** Pose a thought-provoking or relatable question to immediately engage your audience. For instance, "Have you ever wondered how retirement could look if you started investing 10% more today?"
- **Use Intriguing Statistics:** Share a surprising or little-known statistic that highlights the importance of the topic. Example: "Did you know that 40% of people nearing retirement age have no retirement savings?"
- **Tell a Story:** Begin with a short, relatable story or scenario. Stories create a personal connection and can illustrate complex financial concepts. For example, "Meet John, who thought retirement planning was years away, until one decision changed everything."

- **Leverage Current Events:** Tie your content to a recent news event or trend, making it timely and relevant. "In light of recent stock market fluctuations, here's what you need to know..."
- **Challenge Common Beliefs:** Start by challenging a common misconception. "Many believe investing is like gambling, but here's the real deal..."

2. Examples of Effective Hooks in Finance

1. "In the next minute, I'll reveal 3 ways to _____ – faster than you ever imagined."
2. "Hold tight! I'm about to show you how to _____. Yes, it's possible."
3. "Ever heard of the 30-second millionaire's move? Let me show you how it's done."
4. "You're probably making this financial mistake – and it's costing you. Let's fix that now."
5. "I've uncovered a wealth secret the rich keep hidden."
6. "What does Wall Street fear the most? People like you learning this tip."
7. "Imagine achieving financial freedom in just one minute."
8. "Can you really get rich quick? I've got a 60-second truth bomb for you."
9. "There's an investment trap almost everyone falls into. I'll reveal it in 3, 2, 1..."
10. "Think your daily coffee is just a drink? I'll show you how it can make you rich."
11. "Busting a huge investing myth today – and I'm doing it in under a minute."
12. "This financial advice transformed my life. Give me a minute, and it could change yours too."
13. "Discover how to build wealth faster and simpler than you thought – starting now."
14. "I'm about to let you in on a little-known market trick. This changes everything."
15. "Financial wisdom I wish I had in my 20s – and I'm sharing it with you in the next 30 seconds."

Chapter 16: A/B Testing for Content Optimization

In the world of social media marketing, especially for financial advisors, A/B testing is a crucial tool for understanding what resonates with your audience. It involves comparing two versions of content to see which performs better. This chapter delves into how to effectively implement A/B testing and analyze the results for content improvement.

1. Understanding and Implementing A/B Testing

- **What is A/B Testing?** It's a method of comparing two versions of a single variable to determine which one performs better in a controlled environment.
- **Setting Up A/B Tests:** Start by identifying one element you want to test – this could be a headline, an image, or a call-to-action. Create two versions (A and B) with only that one element changed.
- **Controlled Environment:** Ensure that the two versions are shown to a similar audience at the same time. This is crucial for obtaining accurate results.
- **Duration of Test:** Run the test long enough to collect significant data but not so long that external factors could skew the results.

2. Analyzing Results for Content Improvement

- **Measuring Engagement:** Look at metrics like click-through rates, engagement rates, or conversion rates to determine which version performed better.
- **Learning from Data:** Use the insights gained from A/B testing to understand your audience's preferences. This could inform your future content strategy, tone, and messaging.
- **Continuous Improvement:** A/B testing is not a one-off process. Regularly test different elements of your content to continually refine and improve your strategy.

Chapter 17: Simplifying Messages for Better Understanding

Financial concepts can often be complex and intimidating. As a financial advisor, one of your key roles on social media is to break down these concepts into easily digestible and understandable content.

1. Making Complex Financial Concepts Accessible

- **Use Analogies and Metaphors:** Analogies are powerful in explaining complex ideas. For example, comparing compound interest to a snowball rolling downhill can make the concept more graspable.
- **Visual Aids:** Utilize infographics, charts, and visuals to represent data and concepts. A well-designed chart can often communicate an idea more clearly than text.
- **Break it Down:** Divide complex topics into smaller, more manageable pieces. A series on different aspects of retirement planning, for example, can be more effective than one lengthy post.

2. Tips for Clear and Concise Communication

- **Avoid Jargon:** Use simple, everyday language. Remember, not everyone is familiar with financial terminology. If you make people google something, you've lost them already.
- **Be Concise:** Social media users often skim content. Get to the point quickly and avoid unnecessary fluff.
- **Storytelling:** Narratives can be an effective way to communicate complex ideas. Share real-life examples or hypothetical scenarios that illustrate your points.
- **Ask for Feedback:** Engage with your audience to see if your explanations are clear. Use their questions and comments as a guide for future content.

Chapter 18: Reposting Strategies for Increased Reach

Reposting content on social media is like reminding your friends of a great story you already told. It makes sure more people hear it. This chapter is about how to do that well, especially for sharing financial advice.

1. Picking the Right Time to Share Again

- **Wait a Bit:** After you post something, wait a few weeks before you share it again. This gives new people a chance to see it without boring those who have already seen it.
- **Change It Up a Bit:** When you repost, try to change something small. Maybe use a different picture or write a new caption. This keeps things interesting.
- **Make Sure It's Still True:** If you're reposting something about money or the market, check to make sure it's still right. You don't want to share old news.

2. Share It Up to 7 Times for More People to See

- **Not Everyone Sees Your Post:** Usually, only about 10% of your followers see your post each time. If you share it up to 7 times, more people get a chance to see it.
- **Don't Do It All at Once:** Spread out when you repost things. For advice that's always useful, you can repost it over several months.

3. Use Analytics to Choose What to Share Again

- **Watch How Your Posts Do:** Tools that show you how many likes, shares, and comments your posts get can help you understand what your followers like.
- **Pick the Best Ones:** Focus on reposting things that got a lot of likes or shares before. If people liked it once, they'll probably like it again.
- **Try Different Times and Ways:** Experiment with reposting at different times or changing the post a bit. See what gets the most likes or comments to learn what works best.

WHY VIDEO CONTENT IS KING

Chapter 19: The Power of Video in Engagement and Conversion

This chapter explores the significant impact of video content, highlights its status as the most consumed type of content online, and examines current trends in financial advising through video.

The Dominance of Video Content

Video content has become the leader in online engagement, surpassing all other types of digital content. Its ability to convey complex information in an accessible and engaging manner makes it particularly valuable. For financial advisors, leveraging video can transform the way financial concepts are presented, making them easier for clients to understand and apply.

Enhancing Engagement and Conversion

Video's dynamic nature captures attention more effectively than static text or images. It combines visuals, sound, and storytelling to create a compelling narrative. For financial advisors, this means an opportunity to break down intricate financial topics into digestible pieces, making advice more approachable for the audience. Furthermore, videos encourage viewer interaction through likes, shares, and comments, enhancing engagement and expanding reach.

Current Trends in Financial Advising Videos

The financial advising sector has seen several emerging trends in video content, each aimed at increasing viewer engagement and simplifying complex subjects:

- **Educational Content:** Videos that explain financial concepts in simple terms are highly sought after. They serve as educational tools, helping viewers make informed decisions about their finances.
- **Client Testimonials:** Sharing success stories and testimonials through video can significantly boost credibility and trust. These personal accounts offer real-life examples of how financial advising has positively impacted clients.
- **Market Updates:** Regular video updates on market trends and financial news help keep clients informed and engaged. These videos position financial advisors as knowledgeable and up-to-date professionals.
- **How-to Guides:** Step-by-step videos on financial processes, such as budgeting or investing, provide practical value to viewers and help demystify the financial planning process.
- **Contrarian and Myth-Busting Content:** Videos that challenge common financial myths or offer contrarian viewpoints can spark curiosity and debate, encouraging viewers to question and rethink their financial assumptions. This type of content not only educates but also engages the audience by presenting alternative perspectives.

Chapter 20: Best Practices for Creating Compelling Video Content

Creating engaging video content is a powerful way to connect with your audience and share your financial expertise. Here are some top tips for making high-quality videos, along with content ideas and software recommendations suited for financial advisors.

Tips and Tricks for High-Quality Video Production

1. **Lighting is Key:** Good lighting can make a huge difference. Try to film in well-lit areas or use additional lights to brighten up your space. You want viewers to see you clearly, not guess who's talking from the shadows.
2. **Clear Audio Matters:** Bad sound can turn viewers away. Use a good microphone to ensure your audience can hear every valuable piece of advice you share. If you're filming with a phone, consider a clip-on mic for better audio.
3. **Keep the Background Simple:** A cluttered background can be distracting. Film against a neat, professional backdrop that doesn't steal the show from your message.

4. **Plan Your Content:** Before hitting record, know what you want to say. A short script or bullet points can help you stay on track and cover all your key points without rambling.

Engaging Video Content Ideas for Financial Advisors

- **Financial Tips of the Week:** Share quick, actionable financial tips that viewers can easily implement.
- **Explainer Videos on Financial Topics:** Break down complex financial concepts into simple, understandable language.
- **Success Stories:** Highlight client success stories (with their permission) to show the real-life impact of good financial planning.
- **Q&A Sessions:** Address common financial questions you get from your clients. This not only provides value but also encourages viewer engagement.

Video Editing Software

- **CapCut (Free, Entry-Level):** A great starting point for beginners. CapCut is user-friendly and offers plenty of features to edit your videos, add text, and even include music. It's perfect for making those tips and Q&A videos more engaging.
- **Premiere (Paid, Intermediate-Expert):** For those ready to take their video production to the next level, Adobe Premiere is a comprehensive tool that allows for more detailed editing, effects, and overall production polish. It's ideal for creating in-depth explainer videos or client stories.

A Step-by-Step Guide To Creating Awesome Video Content

1. **Brainstorm:** First up, think about what you know best and what your audience would love to learn. This could be anything from saving money, investing wisely, or understanding taxes. Jot down ideas that pop into your head - no idea is too small!
 - **What to Watch Out For:** Avoid overly complex topics that are hard to explain in a short video. Stick to one simple idea per video.
 - **Specific Tips:** Use questions from your clients or common misconceptions in finance as inspiration. Tools like AnswerThePublic can help find what people are searching for.
1. **Script It:** Now, turn your idea into a story. Write a short script or bullet points you want to talk about. Keep it simple, like you're explaining it to a friend. Remember, you want to teach something cool in a fun way!
 - **What to Watch Out For:** Don't write a script that sounds too formal or complicated. You're not writing a textbook!
 - **Specific Tips:** Keep it conversational. Use short sentences and everyday language. If you can make a friend or family member understand the concept when you explain it to them, your script is good to go.
1. **Gather Your Tools:** You don't need fancy equipment to start. A smartphone, a quiet spot with good light, and a simple background will do the trick. If you can, use a tripod or stack of books to keep your camera steady.

- **What to Watch Out For:** Bad lighting and noisy backgrounds can ruin a good video. Also, shaky footage can be distracting.
 - **Specific Tips:** Film during the day in a well-lit room facing a window. Use a quiet, neat space. Your smartphone camera is powerful enough, but ensure it's stable. A simple microphone can also improve audio quality significantly.
1. Dress Rehearsal: Practice your script a few times. Feel free to mess up; it's all part of the process. This step helps you get comfortable with what you're going to say and how you'll say it.
 - **What to Watch Out For:** Over-rehearsing can make your delivery sound robotic. You want to appear knowledgeable yet approachable.
 - **Specific Tips:** Practice in front of a mirror or record your rehearsals to spot areas for improvement. Focus on your body language and tone of voice; they should convey confidence and enthusiasm.
 1. Action Time: Hit record and start filming. Try to be natural and relaxed. It's okay to record a few takes until you get one you like. Smile, and remember to speak clearly and at a good pace.
 - **What to Watch Out For:** Long, unedited takes can be boring. Keep it dynamic but focused.
 - **Specific Tips:** Start with a hook to grab attention within the first few seconds. Speak directly to the camera as if you're talking to an individual, making your viewer feel special. Remember, it's okay to make mistakes; just pause, breathe, and start the sentence over.
 1. Edit Like a Pro: Use free or paid video editing software to cut out mistakes, add music or captions, and make your video pop. This step can take your video from good to great, so play around and see what works best.
 - **What to Watch Out For:** Overdoing effects, transitions, or using loud music can distract from your message.
 - **Specific Tips:** Use editing to add captions, tighten your takes, cut pauses, remove errors, and add clear, concise titles or bullet points to emphasize key messages. Background music should be subtle and not overpower your voice. Tools like CapCut or Canva's video editing features are beginner-friendly.
 1. Share Your Wisdom: Once you're happy with your video, it's time to export it and share it on social media. Pick the right platform where your audience hangs out, be it Instagram, YouTube, or somewhere else. Write a catchy description, add some hashtags, and hit publish!
 - **What to Watch Out For:** Posting at random times can result in fewer people seeing your video. Ignoring comments or feedback can hurt engagement.
 - **Specific Tips:** Research the best times to post on different platforms for maximum visibility. Use relevant hashtags and ask engaging questions in your post to encourage comments. Always respond to feedback to foster a community around your content.

Chapter 21: Leveraging Video Across Different Platforms

As a financial advisor, using video content effectively across various social media platforms can significantly enhance your reach and engagement. Each platform has its unique audience and preferences, requiring a tailored approach to video content. Here are specific tips from industry leaders and detailed strategies for maximizing your video's impact.

Tailoring Video Content for Various Social Media

- **LinkedIn:** Focus on professional, educational content. Share videos that highlight your expertise in financial planning, market analysis, or tips for financial wellness in the workplace. Keep videos concise and to the point, ideally under 5 minutes.
- **Instagram:** Utilize both feed posts and Stories for video content. Short, visually appealing videos work best here. Consider breaking down complex financial concepts into digestible, 1-minute clips or sharing behind-the-scenes looks into your day as a financial advisor.
- **Facebook:** Longer, story-driven content can perform well on Facebook. Use this platform to share client success stories or more detailed explanations of financial strategies. Facebook Live is also a powerful tool for Q&A sessions, allowing real-time engagement.
- **YouTube:** This platform is ideal for in-depth educational content. Create series on specific financial topics, how-to guides, or weekly market updates. Since YouTube videos often show up in Google searches, focus on SEO-friendly titles and descriptions.
- **TikTok:** Embrace creativity and simplicity. Quick tips, financial myth-busting, or humorous takes on common financial misconceptions can capture attention. Keep videos short and engaging, utilizing TikTok's features like music and effects to enhance your message.
- **Twitter:** Twitter is great for sharing video content that's brief and impactful. Use this platform to post short clips from your longer videos, highlights from webinars, or quick financial tips that spark curiosity. Twitter's fast-paced nature means your videos should get to the point quickly and encourage viewers to explore more detailed content on your website or YouTube channel. Engage with current trends or hashtags related to financial planning to increase visibility.

Strategies for Maximizing Video Reach and Engagement

1. **Optimize for Each Platform:** Customize video dimensions and formats according to each platform's requirements. For example, vertical videos work best for Instagram Stories and TikTok, while horizontal videos are suitable for YouTube and Facebook.
2. **Use Captivating Thumbnails and Titles:** Your video's thumbnail and title are the first things viewers notice. Make them engaging and reflective of the video's content to increase click-through rates.
3. **Incorporate Subtitles:** Many people watch videos without sound, especially on mobile devices. Adding subtitles ensures your message gets across regardless of how people are viewing your content.

4. **Engage with Your Audience:** Encourage viewers to comment, like, and share your videos. Respond to comments to foster a community and show your audience that you value their engagement.
5. **Promote Across Channels:** Don't limit your video to one platform. Share it across all your social media channels, and consider embedding videos in your blog posts or newsletters to maximize exposure.
6. **Analyze and Adapt:** Use each platform's analytics tools to track your video's performance. Look at metrics like view count, engagement rate, and watch time to understand what content resonates with your audience and why.

Chapter 22: Short Form Video Content Secrets for Lead Generation

Short-form video content is a powerful tool in the arsenal of financial advisors seeking to generate leads and engage their audience quickly. Let's uncover the secrets to mastering short-form video for impactful lead generation.

Mastering Short-Form Video for Quick Impact

The key to short-form video is making a quick, memorable impact. Your goal is to convey a compelling message that sticks with viewers, encouraging them to learn more about your services. Start with a strong hook to grab attention, then deliver your message clearly and concisely, closing with a call to action that guides viewers on what to do next.

Why Short Form Video Gets the Most Impressions

Short-form videos are the champions of social media impressions. Their brief nature aligns perfectly with the short attention spans common in today's fast-paced digital environment, making them more likely to be watched in full and shared. Platforms like Instagram Reels, TikTok, and Twitter thrive on this content, offering the perfect playground for financial advisors to showcase their expertise in a digestible format.

Best Content for the Top of Your Funnel

At the top of your funnel, focus on content that introduces viewers to your brand and services in an engaging way. Consider:

- **Quick Tips:** Share actionable financial advice in under a minute. Tips on saving, investing, or budgeting work well.
- **Myth-Busting:** Debunk common financial myths. This not only educates but also positions you as a trusted advisor.
- **Trending Topics:** Tap into current trends or news in finance and offer your unique perspective.

Quantity Will Give You Quality

In the world of short-form video, producing a high volume of content increases your chances of discovering what resonates best with your audience. This doesn't mean sacrificing quality but rather adopting a more dynamic and iterative approach to content creation. The more you create, the better you understand your audience's preferences and the more refined your content becomes.

Avoid the Three Sins

For short-form video to be effective, steer clear of these pitfalls:

- **No Hook:** Failing to grab attention in the first few seconds is a missed opportunity. Always start with something eye-catching.
- **No Captions (Subtitles):** Many people watch videos without sound. Captions ensure your message gets across regardless of how it's viewed.
- **No Cuts:** Static videos can be dull. Use cuts and transitions to keep the energy up and maintain viewer interest.

Case Studies of Successful Short-Form Video Campaigns

- **Financial Advisor TikTok Series:** A financial advisor we worked with used TikTok to create a series of 30-second videos explaining basic investment concepts, using humor and simple language. The series went viral, significantly increasing website traffic and consultation bookings.
- **Instagram Reels Savings Challenge:** Another advisor client posted a weekly savings challenge on Instagram Reels, encouraging followers to save a small amount each day. The interactive nature of the challenge spurred engagement and led to a noticeable uptick in followers and leads.

SMART USE OF AI & AUTOMATION

Chapter 23: AI Tools for Content Creation and Scheduling

In the digital age, staying ahead in content creation and management is crucial for financial advisors. AI tools can revolutionize how you handle content, making the process more efficient and creative. Let's explore some AI tools that can elevate your content game.

Leveraging AI for Efficient Content Management

Many folks aren't fully tapping into the potential of AI in content creation. It's more than just copying what others do; it's about understanding and using these tools to their fullest. To keep up with the latest in AI, check out directories like theresanaiforthat.com.

Tools for Automated Content Creation

- HeyGen - a tool that allows you to create a digital clone of yourself, packed with your voice, gestures and appearance. you can input any script you want and your clone will present the content in an eerily similar fashion to your real self. Great for those who don't like to be in front of the camera. You can also use it to create a brand ambassador for your brand that is not you. This is a tool that will put you MILES ahead of everyone else.
- ChatGPT - Most people use ChatGPT wrong. They prompt a question and make chatGPT write everything for them. The content output then sounds dull, life-less and mechanical. Instead of doing that, use ChatGPT as an assistant. Come up with your own ideas, write-ups, scripts and content first. THEN, run it all through ChatGPT and ask for improvements, expansions on content, more ideas or overall feedback. You can also make use of ChatGPT's latest additions: DALLE-3 and GPTs:
- DALLE-3 - This tool will generate any sort of art or graphic that you can think of. It gives your posts an exciting look, it adds depth to your blog posts and it attracts the attention potential viewers if you use them in your thumbnails. An alternative is Midjourney, a more manual and advanced image-generation model.
- GPTs: GPTs are like apps for ChatGPT. They are pre-trained models that can help you perform a specific task. The advantage is that each GPT is specialized in its own area, as opposed to running a general ChatGPT conversation. Browse through all available GPTs and use them to your advantage.
- [Captions.AI](#) - this tool is a very powerful one. It has many capabilities. From breaking down long form content into short -form clips on its own, to adding automatic captions, to translating the audio your videos into other languages (yes - that's right, you can test out what you'd sound like in Spanish, Italian, Arabic, Chinese... you name it). It also has other cool features like automatic cuts where it detects pauses and a ton of general editing features using AI.
- [Unifire.ai](#) - Unifire repurposes audio and video content into ten different text formats, from LinkedIn to 8000-word blog posts. **All trained on your tone & style**. This means that you can create 1 piece of content and turn it into at least 10 other formats. The benefit is that you can train Unifire to adopt your tone and style, which means the content will sound genuine. This tool alone can save up to 10 hours for you each week.
- [Undetectable.ai](#) - Let me share a secret with you - Google and most social media networks can easily detect whether or not your content was written by A.I. And if it detects content that was created in majority by A.I. it will penalize you. That means no SEO reach, less views on your post, no engagements. Posting 100 times a week won't help you if nobody is watching your content. The workaround is using a tool like Undetectable. It reads your content and "humanizes" it, by changing sentence structure,

word choice and grammar. This is a MUST if you are using A.I. for blogs or social media posts.

Chapter 24: Automating Outreach, Engagement, and Responses

In our fast-moving world, using tools to help automate some tasks like reaching out, engaging, and responding can be really helpful for financial advisors. It's a great way to manage time while staying active online. Let's check out some tools that can help with this and talk about finding the right mix between automation and personal touch.

Tools for Automated Responses and Engagement

1. **[Manychat.com](#)**: This program acts like a helper for your marketing on platforms like Instagram, WhatsApp, and Messenger. It helps with replies, comments, captures leads, and works with your CRM system. It's especially good for automating common interactions, leaving you more time for personal engagement.
2. **[Socialmagic.ai](#)**: This tool makes automatic comments for LinkedIn. But sometimes, the output can feel generic and lacks a personal touch. A good idea is to use it as a starting point and then edit the comments to add your own voice. This can really help build stronger relationships on LinkedIn.
3. **Dux-Soup**: Dux-Soup is an excellent tool for LinkedIn automation. It helps you connect with potential customers, reach out to more people, and get more leads while freeing up your time. You can set up campaigns for sending connection invites, viewing profiles, following, endorsing, and sending messages, all automated and personalized with custom time delays. Remember, following up personally is key once a potential customer shows interest.
4. **IG DM Bot**: This Chrome extension allows you to send automated direct messages to a targeted audience on Instagram, like followers of a specific account. It's important to use this tool wisely to avoid spamming and risking your account. Set a daily message limit (50-200) to maintain natural interaction.

The Automation-Personalization Tradeoff

- **Finding the Right Mix**: The more you use automation, the less personal your interactions become. It's really important to find the right balance, especially in the financial advising sector where trust and personal relationships are key.
- **Funnel Strategy**: At the start of the funnel, where the goal is to capture as many leads as possible, automation can be turned up. As the potential client moves down the funnel, gradually increase personalization to build a stronger connection.
- **Real People Matter**: In areas where a personal touch makes a big difference, like customer support or in-depth consultations, make sure that real people are involved. Automated responses can handle initial questions, but a real person should be available for more detailed or sensitive talks.

ENGAGING & GROWING YOUR AUDIENCE

Chapter 26: Building a Community Around Your Financial Advisory Brand

For people who help others with their money, like financial advisors, it's really important to make a group of people who like and trust your brand. This is because they can help you find new clients and recommend you to others. Instead of just focusing on selling services, it's also important to make real connections with people. This chapter will show you how to make this group of people online and get them to really like your services.

How a Community Can Help You

- **The Strength of a Community:** In the world of financial advising, a community is more than just a list of clients. It's a group of people who trust your advice and will tell others about you. This is really valuable in the money world.
- **More than Just Selling:** Selling services is important, but making a community is a good way to keep growing. It lets you talk to your clients regularly and have a deeper connection than just selling services.

How to Make a Real Financial Advisory Community

- **Talk About Your Money Beliefs:** Don't just talk about what services you offer. Also share what you believe about planning and investing money. This will attract clients who agree with you.
- **Really Connect:** Talk to your audience regularly, like on money advice forums, answering their comments, or sharing news about money trends. This helps build trust and shows you're reliable.

How to Grow an Online Money Community

- **Special Content Just for Your Community:** Give your community special things like detailed reports about the market, books with investment tips, or newsletters with insider info. This makes being part of your community really valuable.
- **Hold Online Events:** Doing events online, like webinars and workshops, is a good way to talk to your community in real time. These can be about general money planning or specific investment strategies.
- **Make Space for Clients to Talk to Each Other:** Make places like groups on LinkedIn or special forums where clients can share their experiences, talk about money topics, and support each other.

How to Get Followers to Really Like Your Money Brand

- **Personalize Your Advice:** When you answer questions, make sure to use the person's name and tailor your response to them. This makes clients feel important and understood.
- **Thank People for Participating:** Say thank you to the people in your community for helping out. You could share stories of successful clients or just thank them for being active. This makes people feel like they belong.
- **Keep Sharing Money Info:** Always share useful info and insights about money planning and market trends. Your community should feel like they're always learning something new.

Chapter 27: Organic Growth Techniques vs. Paid Advertising

In the world of financial advising, reaching your audience can be done in two main ways: organic growth and paid advertising. Both have their strengths, and understanding how to use them can really help your business. Let's compare these methods and see how they fit into the financial advising field.

Organic Growth: Growing Naturally

Organic growth is all about building your audience without paying for ads. It's like planting a garden - you nurture it, give it time, and it grows naturally.

- **Quality Content is Key:** Share valuable financial tips, market insights, and advice that genuinely helps people. When your content is good, people are more likely to share it with others.
- **Engagement Matters:** Talk with your audience. Answer their questions, comment on their posts, and join financial discussions. This builds trust and shows you're an active part of the community.
- **Testing for Champions:** Not all content is created equal. See which posts get the most likes, shares, or comments. These are your "champions" - the content that does really well. You can think about using these as the basis for paid ads later.
- **Leveraging Short Form Video Content:** Utilizing short form video content posts can be highly effective and cost-efficient. Creating these types of content doesn't cost you anything, yet they have the potential to reach thousands, if not millions, of viewers. This is a big advantage over paid ads, which can require a significant budget to achieve similar levels of visibility. By focusing on engaging, concise content that captures attention quickly, you can amplify your reach and impact without the extra expense.

Paid Advertising: Boosting Your Reach

Paid advertising means you pay to get your content in front of more people. It's like putting up a big billboard so more people can see your message.

- **Targeted Approach:** With paid ads, you can choose exactly who sees your content. This is great for reaching specific groups who might need financial advice.

- **Immediate Results:** Unlike organic growth, which takes time, paid ads can get you in front of a large audience quickly.

Best Practices for Each Approach

- **Organic Growth:** Be patient and consistent. Keep sharing helpful content and building relationships. Over time, your audience will grow, and so will your business.
- **Paid Advertising:** Be strategic. Know your audience and tailor your ads to speak to their financial needs and goals. Monitor your ads to see which ones perform best and adjust accordingly.

Advertising Financial Products: Things to Keep in Mind

- **Follow the Rules:** There are strict regulations about advertising financial products. Make sure your ads are clear, truthful, and follow all legal requirements.
- **Be Transparent:** Always be clear about what you're offering. Avoid making promises that sound too good to be true.
- **Educate Your Audience:** Instead of just selling a product, use your ads to educate people about financial planning and investing. This builds trust and shows you're an expert in your field.

DIVING DEEPER INTO LEAD GENERATION

Chapter 28: Strategies for Effective Lead Generation

As a financial advisor, generating leads is the cornerstone of growing your client base and expanding your business. But in a market saturated with options, how do you stand out and attract the right clients? This chapter delves into effective strategies tailored for financial advisors to enhance lead generation.

Inspired by the insights of lead generation expert Alex Hormozi, we'll adapt his concepts specifically for financial advisors. Let's break down the process of generating leads, creating an irresistible offer, and converting those leads into loyal clients.

The Foundation: Crafting Your Offer

The journey begins with your offer – the heart of your business. It needs to solve a real problem that your potential clients face. But having a great service isn't enough; you need to let people know about it. This is where lead generation comes into play. Leads are potential clients who have shown interest in what you offer – be it through signing up for your newsletter, visiting your

website, or following you on social media. The more leads you generate, the more opportunities you have to make a sale.

Expanding Your Reach

Growing your financial advising business means focusing on two areas: getting more leads and attracting high-value leads. Effective advertising on platforms like Google and Facebook, or sponsoring financial podcasts, can significantly increase your reach. To attract high-end clients, refine your messaging to resonate with their specific needs and expectations. If necessary, revisit your core offer to ensure it aligns with a 'million-dollar' standard.

Introducing the Lead Magnet

For complex or premium offers, a lead magnet is a crucial strategy. A lead magnet is a low-cost or free item that attracts leads and introduces them to your core services. It addresses a specific, immediate problem, paving the way for your comprehensive financial planning services.

Let's say you're a financial planner. Your lead magnet could be a free introductory webinar on investment basics. It solves a surface-level problem (lack of investment knowledge) and leads to your core service (comprehensive financial management).

When developing your lead magnet, consider these strategies:

1. **Highlight a Problem:** Create a lead magnet that reveals an issue the lead might not know they have, which your core service can solve. For instance, a free financial health checklist can highlight areas where a client needs financial planning.
2. **Preview Your Service:** Offer a taste of what you do. A financial advisor might provide a free initial consultation to assess a potential client's financial status.
3. **Solve an Initial Problem:** Address an early step in your client's financial journey. This could be an eBook on budgeting basics that leads to more in-depth financial planning services.

Your lead magnet can vary in format – webinars, eBooks, simple tools, or even physical items. Test different options to see what resonates most with your audience. Remember to give it an appealing name and a professional look.

Understanding Your Audience: Warm vs. Cold

- **Warm Audience:** These are the people who already know about your financial advising services or are open to hearing from you. They might be past clients, referrals, or followers on social media.
- **Cold Audience:** These are complete strangers who have never interacted with your financial advising brand. Reaching them requires different tactics.

Four Core Advertising Approaches

1. **Warm One-to-One:** Personalized outreach to existing contacts, like emails or calls. This could involve checking in with past clients or following up on referrals.
2. **Warm One-to-Many:** Posting valuable content for your current audience on platforms like LinkedIn or your blog. This helps maintain and grow your existing relationships.
3. **Cold One-to-One:** Direct outreach to unfamiliar leads, perhaps through LinkedIn messages or cold emails. This requires a more tailored approach to introduce your services.
4. **Cold One-to-Many:** Buying ads on platforms like Google or Facebook to reach new potential clients. This is about casting a wider net to attract new leads.

Best Practices for Each Method

- **Warm Outreach:** Start by making a list of all your warm contacts. Reach out personally through the most appropriate channel, aiming for at least 100 contacts daily. Use the ACA approach – Acknowledge, Compliment, Ask – in your communications. Offer something free to the first few prospects to encourage engagement.
- **Warm One-to-Many:** Share content that offers clear benefits. Use the BASC framework: Begin with a hook, retain Attention with a story, deliver the Content, and end with a Call to action. Balance giving valuable advice with subtle promotion of your services.
- **Cold Outreach:** It's all about reaching a large number of potential clients. Personalize your message but keep it efficient. Use tools to automate and scale your outreach efforts.
- **Paid Ads:** When using paid advertising, target platforms where your potential clients are likely to be active. Craft attention-grabbing ads with a clear summary of your offer and a strong call to action.

Maximizing Results through Leverage

- **The Power of Leverage:** In business, especially financial advising, leveraging means getting more results with less effort. It's like having a team helping you spread the word about your services instead of doing it all alone.

Groups to Leverage for Lead Generation

1. **Your Customers:** Happy clients are your best promoters. They can recommend your services to friends and family, essentially giving you free marketing. If you're not getting referrals, check if your service could be better or if you just need to ask for them. For example, offer a bonus for every referral that becomes a client, much like Dropbox did with free storage.
2. **Your Employees:** Once you have a team, train them to be experts in generating leads. Create a manual for your outreach process and show them how it's done. Practice with them and give feedback. Your employees can become powerful advocates for your business.

3. **Advertising Agencies:** Hiring an agency can be a great way to get leads, though it costs money. You might work with them for a short period, like six months, to learn their strategies. Then, you can teach these methods to your own team.
4. **Affiliates:** These are external businesses or influencers who promote your services to their audience. Find people who already reach your ideal clients. Make sure they really believe in what you offer and understand it well. Pay them based on how many leads they bring in, and treat them like they're special clients of your own.

As you continue to explore lead generation strategies for financial advisors, it's crucial to embrace the idea of trial and error. Setting aside a part of your marketing budget for testing new strategies is key, even if these experiments don't yield immediate results.

Embracing Failure as a Stepping Stone

- **Permission to Fail:** Start by giving yourself the freedom to try things out and fail. Allocate a portion of your marketing budget for experimenting with different strategies, without the pressure of immediate success.

Testing and Identifying Successful Strategies

- **Experimentation is Key:** Your goal is to try out various approaches to see what resonates with your specific financial advising business. Be prepared for a low success rate; sometimes, only a small fraction of tactics might work, but those few can bring significant returns when scaled up.
- **Doubling Down on What Works:** Once you find an effective strategy, invest more in it. This might mean increasing your budget or dedicating more resources to that area. Rapidly test and refine your approach, continuously seeking your next successful tactic.

The Importance of Volume in Lead Generation

- **Massive Exposure:** To truly connect with potential clients, you need a wide-reaching presence across various channels. Don't get discouraged by low response rates. When you're operating at large volumes, even a small percentage of success can lead to substantial growth in leads.
- **Optimizing Your Efforts:** If your current strategies aren't delivering as expected, increase your frequency, budget, and effort. Push each channel to its maximum potential, as long as it's sustainable for your business.

Chapter 29: Strategies for Lead Qualifying

Lead qualification is all about figuring out if a potential client fits the profile you're looking for and how likely they are to become a long-term customer. This process is essential for all types of sales strategies, whether you're offering financial products or services.

Understanding Lead Qualification

Lead qualification involves collecting as much information as possible about potential clients. This helps you identify the most promising leads, saving time and resources. By focusing on highly qualified leads, you're more likely to see a higher conversion rate and work with clients who truly value what you offer.

A Real-World Example

Imagine this: a financial advisor has 10,000 leads but chooses to contact only 11 that seem highly qualified. Out of these, 7 become clients. That's a 64% conversion rate. This example shows that targeting qualified leads can lead to better results with less effort compared to reaching out to a larger, unfiltered group of potential clients.

Lead Qualification Frameworks

Frameworks for lead qualification bring structure to your process. They consider important factors like the potential client's needs, budget, and decision-making power.

- **BANT Framework:** This classic framework covers Budget, Authority, Need, and Timeline. Here are some example questions you might ask in a qualifying form:
 - **Budget:** "What is your budget for financial planning services?"
 - **Authority:** "Are you the decision-maker regarding financial investments in your household?"
 - **Need:** "What specific financial goals are you looking to achieve?"
 - **Timeline:** "By when do you hope to achieve these financial goals?"

You can (and should) develop your own questions, and include other demographic/psychographic inquiries.

Where Does Qualifying Happen?

The best time to qualify leads is before you even speak with them. This is easily done through your social media interactions and website.

- **Driving Actions:** Encourage people engaged with your social media content to visit your website or landing page.
- **The Landing Page:** There are a few key elements that your landing page needs to include to maximize conversion. We will look at those in detail in the next chapter. For now, understand that your landing page should make it easy for potential clients to schedule a call with you or another advisor from your firm. A tool like Calendly can be very effective here.
- **Using Calendly:** Calendly allows prospects to schedule a call and fill out a form with qualifying questions. This gives you valuable insights into the lead before the meeting. You can then decide if they are a good fit for your services and either accept the meeting or route it to the appropriate advisor. If they're not a fit, you can decline the meeting, conserving valuable time for more suitable leads.

THE LANDING PAGE

Chapter 30: Creating a Highly-Converting Landing Page

Your landing page is like your digital handshake – it's often the first substantial interaction potential clients have with your brand. Let's dive into how to create a landing page that not only welcomes visitors but also effectively converts them into leads and clients.


Key Elements of a High-Converting Landing Page

1. **Simplicity and Focus:** A landing page should be more straightforward than your website. It's designed with one goal in mind – to convert visitors into leads. Avoid clutter and keep the focus on your main message and call to action.
2. **Video Sales Letter (VSL):** Place a short video at the top of your landing page. This video should welcome visitors, hook them with engaging content, and explain your financial advising services. Use this opportunity to verbally qualify leads by stating who your services are best suited for. Aim for a concise video, around 2-3 minutes.
3. **Calendly Scheduler with Lead Qualifying:** Incorporate the Calendly tool from the previous chapter to allow potential clients to easily book a call with you. Through Calendly, you can ask qualifying questions to ensure the leads are a good match for your services.
4. **Concise Copy:** Keep written content brief and impactful. Focus on compelling headlines that convey your message quickly and clearly. Long paragraphs can overwhelm visitors, so stick to short, punchy text.
5. **Consistent Branding:** Ensure that the colors, tone of voice, and graphics on your landing page match your social media and overall brand identity. Consistency helps in building trust and recognition.
6. **Single Call to Action:** Your primary call to action should be for the visitor to book a call with you. Make this action clear and easy to find on the page.
7. **Tracking Pixel for Retargeting:** Implement a tracking pixel on your landing page. This tool allows you to follow up with visitors who didn't book a call through retargeted advertising, potentially lowering your ad costs.
8. **Discovery Call as a Lead Magnet:** Make your one-on-one discovery call the centerpiece of your landing page. This personal interaction is not just a call – it's a powerful lead magnet. It gives potential clients a valuable opportunity to discuss their financial goals with an expert. Prominently feature this offering to highlight the immediate benefit of connecting with you, encouraging visitors to take the first step in their financial advising journey.

Let's look at an example

Thomas Kopelman's landing page at allstreetwealth.com/thomas is a good example of a webpage that helps turn visitors into clients.

allstreet.



Thomas Kopelman

[Schedule a Call with Me](#)

Co-founder [@allstwealth](#)

💰 Helping equity compensated millennials & entrepreneurs build wealth

[Join AllStreet Academy](#) - the financial education we should've gotten in school

[Subscribe to my monthly money newsletter](#)

[Listen to The Long Game podcast](#)

[Check out my YouTube](#)

Top 100 Advisor by [@Investopedia](#)

[Twitter](#) [LinkedIn](#) [Instagram](#)

It's simple and straight to the point, which makes it easy for people to understand what he offers. Although he doesn't have a Video Sales Letter, there's a form where you can schedule a call and ask questions to see if Thomas's services are right for you. He even mentions what his service fees start at. This is a smart way to make sure he talks to the right people. The page looks professional and matches his brand, which helps build trust. Overall, it's a great page for people looking for financial advice. To see more, you can visit [Thomas Kopelman's page](https://allstreetwealth.com/thomas).

Let's work together.

To help make sure that I'm the right financial planner for you, please complete the below form so that I can reach out and schedule a call.

Because client spots are limited, fully-completed forms receive priority response

NAME*

Please enter your first & last name

EMAIL ADDRESS*

Please enter your best email address

LOCATION*

Please enter your primary state of residence

WHAT DO YOU DO FOR A LIVING?*

E.g. Founder of a local landscaping company

(IF BUSINESS OWNER, PLEASE SPECIFY REVENUE & EMPLOYEE COUNT)

Please enter estimated annual revenue & total employee count

CURRENT ANNUAL INCOME*

- \$0-\$100,000
- \$100,000-\$250,000
- \$250,000-\$500,000
- \$500,000-\$750,000
- \$750,000-\$1,000,000
- \$1,000,000-\$2,000,000
- \$2,000,000+

CURRENT NET WORTH*

- <\$2,000,000
- \$2,000,000 - \$5,000,000
- \$5,000,000-\$10,000,000
- \$10,000,000-\$20,000,000
- \$20,000,000-\$40,000,000
- \$40,000,000+

DESIRED SERVICE*

- Financial Plan + Ongoing
- Just Financial Plan
- Not Sure Yet

WHAT HAS LED YOU TO LOOKING FOR A FINANCIAL PLANNER?*

Please type your response here

PLEASE PROVIDE SPOUSE, PARTNER, OR SIGNIFICANT OTHER'S NAME AND EMAIL ADDRESS (TO GIVE YOU THE BEST FINANCIAL PLANNING EXPERIENCE, MEETING ATTENDANCE FROM ALL PARTIES IS STRONGLY PREFERRED).

Please type your response here

Talk with AllStreet Wealth

Minimum pricing is \$12,000/year for ongoing financial planning

Notice the bottom message: “Minimum pricing is \$12,000/year for ongoing financial planning. That’s a GREAT way to qualify leads and reduce time wasted on people who can’t afford your services.

TRACKING WHAT MATTERS

Introduction to Chapter 31: Identifying Key Metrics

In the fast-paced world of social media, understanding and tracking the right metrics is key for financial advisors. This chapter dives into the crucial metrics that matter both for your content and throughout your sales funnel. By pinpointing these key indicators, you can fine-tune your social media strategy, ensuring that your efforts are not just seen, but are also effective in bringing clients to your door. Let’s explore how to measure success and make every post count in your financial advising business.

- Key Metrics for Content:
 - Impressions & Reach: while this metric can be a “vanity” metric, it’s still very important for showing you if your content is reaching a wide audience or not. Look for the best performing content monthly in terms of impressions and reach to identify content ideas that resonate with a wide audience. It most likely means people are sharing your content.
 - If you are not getting impressions, try getting inspiration from competitors and similar accounts. It just means you need to find out what people truly resonate with.
 - **Engagement count:** This is the number of likes, comments and shares/saves your posts receive. They are more valuable than impressions, because it means people found value. People say saves are the most important, but comments in my opinion are the best.
 - If you are getting some views but no engagement, try increasing the overall quality of your content. Tighten up the video, put a little more effort into the graphics and make sure you encourage people to share their thoughts within the caption.
 - **Engagement rate:** This is the average number of engagements your posts receive every month. To get this number, take the total number of posts on a platform and divide them by total number of likes, comments, shares and saves they received. This will give you an eagles eye-view on how well you are doing at creating engaging content.
 - **Profile Visits:** These are very important. This means someone saw your post and wanted to learn more about you. Only some platforms provide you with this metric though. You should aim for each piece of content to generate profile views. If not, your content is not creating any leads!

sources of traffic. For example, Blogs, Ads, Newsletters, organic posts, and direct social media shares.

- Click-through-rates: Same as above, but this means someone saw your ad and decided to visit your landing page. This metric is the most important metric in your social media ads. It means your ad is working and driving people to the page.
 - If your ad is not driving people to your page, it means you failed to capture their attention, tap into their curiosity or presented a problem they can relate to (and think you can solve for them.) You have to look deeper into your ad analytics to figure out the problem, but it's usually one of those three.
- **Conversion rate:** This is what you are aiming for. Conversion means different things for different funnels. It can be a form fill, a call booked, a service bought, a newsletter signed up for. Your conversion rate is calculated by taking the total traffic number and dividing it by the number of conversions. As a general rule, you will get about 10% conversion rate on your traffic, but you should aim much higher.
 - Low conversion rates can happen due to many reasons. Some of them include poor copy that doesn't intrigue the lead, a complicated landing page with no clear path to conversion, discord between the branding on your social and the branding on the landing page, multiple call-to-actions that lead to different outcomes and slow website loading time. There are other reasons your website won't convert, but try to fix these potential conversion-killers first.
- **Closing Rate:** This is the number of leads you successfully convert into paying clients. It doesn't matter what offer, it just matters that you closed them. The entire funnel has worked hard for THIS particular metric to be maximized! If you are doing well, great job!
 - If you get a bunch of appointments but you are closing very few or none, it's usually due to one of two reasons: 1. The lead is not qualified and won't be a fit because you didn't pre-screen them before the call. Or 2. You don't have closing abilities, which means you have to learn how to close or hire someone who can do that for you.
- **Customer Life Time Value:** This is the total amount of money a single client has invested in you over their lifetime. This metric indicates your ability to upsell, cross-sell, down-sell and retain clients in the long run. The moment you sign a client, this metric should become your north star.
 - If you can't keep clients around, it's pretty straightforward: you failed to deliver substantial value and they can't see a reason to continue spending money on your services. This can also happen when you focus on one-off solutions rather than a long-term roadmap where you can constantly offer more value and results to your clients.

Chapter 32: Tools and Techniques for Tracking and Analysis for Financial Advisors

In the digital world of financial advising, keeping track of how well your social media and website are doing is super important. This chapter is all about the tools you can use to see what's working and what's not. Whether it's your social media posts or your website, knowing these things helps you connect better with potential clients.

Analytics Tools for Social Media

1. **Buffer:** A user-friendly tool that lets you schedule posts, track the performance of your content, and manage all your social media accounts in one place.
2. **Hootsuite:** Great for managing multiple social media platforms. It helps you schedule posts, monitor conversations, and check out detailed reports on how your content is doing.
3. **Sprinklr:** This tool is a bit more advanced and is excellent for larger advisory firms. It offers detailed analytics and helps manage customer experiences across different social media channels.
4. **SproutSocial:** Perfect for understanding your audience better. It provides detailed reports and insights, making it easier to tailor your financial advising content to what your audience likes.
5. **Sendible:** A solid choice for managing social media and measuring its effectiveness. It's especially good for working in teams, like if you have a group managing your social media.
6. **RivalIQ:** This tool not only tracks your performance but also lets you peek at what your competition is doing. It's like having a little spy that helps you stay ahead in the financial advising game.

Analytics Tools for Websites/Funnels

1. **Google Analytics:** Probably the most popular tool out there. It helps you see who's visiting your website, what they're looking at, and how they got there.
2. **SemRush:** Great for SEO and understanding how your website is performing in search engines. This is crucial for financial advisors who want to be easily found online.
3. **Matomo:** A privacy-focused analytics tool. It gives you insights without compromising the privacy of your website visitors.
4. **Plausible:** Another privacy-friendly tool that's simple and easy to use. It shows you the basics of how your site is doing without all the complex data.
5. **Clicky:** Offers real-time analytics, so you know what's happening on your site right away. This can be super helpful for tracking the immediate impact of your content or ads.
6. **Impact Hero by SemRush:** This tool digs deep into your content, showing you what's working best in your funnel and helping you make content that your potential clients will love.

Chapter 33: Using Data to Refine Your Social Media Strategy for Financial Advisors

For financial advisors, social media isn't just about posting content; it's about posting the right content. This chapter will guide you through using data to make smart changes to your social media strategy, ensuring your efforts resonate with your audience and help grow your business.

Leveraging Data for Strategic Adjustments

- **Finding Your Champions:**
 - **Identify Top Content:** Regularly review your content's performance on a monthly, quarterly, and yearly basis to identify what's working best.
 - **Replication and Reposting:** Use your top-performing content as a model to create similar posts. Since these are proven to engage your audience, reposting them can maintain engagement.
 - **Repurposing Content:** Tools like Unifire AI can turn these top posts into different content formats, maximizing their reach and impact.
 - **Creative for Ads:** Since these posts are already popular, they make great material for ad campaigns.
 - **Mini-Series as Lead Magnets:** Bundle your best content into a mini-course or series, which can serve as an attractive lead magnet for potential clients.
- **Training Your 'Recruits' with Your Champions:**
 - **Analyzing Successful Elements:** Look at what makes your top content work – is it the hook, length, topic, or call to action?
 - **Applying to Underperformers:** Take these successful elements and apply them to content that didn't perform as well. For example, adjust the hooks of less popular posts to mirror those in your top content, then repost and observe the difference.

Case Studies of Data-Driven Strategy Improvements

1. A financial advisor we worked with noted that short, informative video clips on investment strategies were getting the most engagement. By creating more content in this format and repurposing these videos into blog posts and infographics, they saw a 50% increase in engagement and a notable rise in consultation requests.
2. Another advisor realized their longer posts weren't doing as well. They shortened the posts, used more engaging hooks from their top content, and saw a 30% increase in likes and shares.

THE NEXT STEPS: MAKE THE MOST OF YOUR MARKETING EFFORTS

Chapter 34: When to Consider Professional Social Media Services for Financial Advisors

In the bustling world of financial advising, managing social media can be a daunting task. While it's a powerful tool for client engagement and lead generation, it also demands significant time and expertise. This chapter will help you evaluate when it's time to bring in professional social media services and the benefits they can offer.

Evaluating the Need for Professional Assistance

As a financial advisor, your expertise lies in managing finances, not necessarily in crafting social media strategies. Here are some pain points that might indicate it's time to seek professional help:

- **Time Constraints:** Managing social media effectively requires consistent effort. If you're finding it hard to balance client management and social media, it might be time to delegate.
- **Learning Curve:** Social media platforms are constantly evolving. Staying updated with the latest trends and algorithms can be overwhelming and distract you from your core responsibilities.
- **Complexity of Content Creation:** Creating engaging, educational content that adheres to industry regulations can be challenging. Professionals can help navigate these complexities while maintaining your brand voice.
- **Efficiency and Effectiveness:** If your social media efforts aren't converting into tangible business growth, professional help can bring in the expertise needed for a more strategic approach.

Benefits of Expert Social Media Management

Professional social media services can bring numerous advantages to your financial advising business, particularly in areas highlighted throughout this book:

- **Strategic Planning:** Experts can develop a comprehensive social media strategy that aligns with your business goals, targeting the right audience with appropriate content.
- **Quality Content Creation:** Professionals can produce high-quality, compliant content that resonates with your audience. This includes creating effective Video Sales Letters (VSLs), engaging posts, and informative articles.

- **Analytics and Reporting:** Experts can track, analyze, and interpret social media metrics to refine strategies continually. This aligns with the need to identify and replicate successful content, as discussed in earlier chapters.
- **Time-Saving Automation:** They can implement and manage tools for automating various aspects of social media, from posting schedules to lead qualification processes.
- **Lead Generation and Conversion:** Professional services can optimize your social media platforms for lead generation, using tactics like landing page optimization and conversion-focused content.
- **Consistent Branding:** Professionals ensure that your social media presence reflects your brand identity, maintaining consistency across all platforms.

Chapter 35: How Our Services Can Enhance Your Social Media Efforts for Financial Advisors

In the dynamic world of financial advising, standing out on social media is essential but often challenging. This is where specialized services can make a significant difference. This chapter introduces Mauve, our marketing agency, and its unique program tailored for financial advisors and planners.

Introducing The ProspectPrestige Program

- The ProspectPrestige is a powerful lead generation service that helps Financial Advisors attract 30 new highly qualified leads in 90 days without relying on referrals, wasting time on unfit prospects, or doing more marketing work, so they can build a legacy business and achieve financial freedom
- **Proven Track Record:** We have worked with top financial advisors across the United States. Our clients have transitioned from struggling to book new leads through referrals to needing to hire more advisors due to the surge in demand generated through our program.

Call to Action: Free Discovery Call

- **Personalized Consultation:** We invite you to a free discovery call where we can discuss your unique needs and determine if you are a good fit for our limited program.
- **Investment in Your Future:** This exclusive opportunity is geared towards advisors and firms ready to invest \$30,000 in their business now. It's a strategic investment aimed at propelling your business forward.