

MARKETING MADE

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Growth of The Virtual Advisor

Consumers are increasingly using technology to receive personalized financial information and advice without ever leaving the comfort of their home. As we all witnessed this past year, client meetings have moved from the traditional in-person setting to Zoom virtual appointments. Ultimately, this shift is changing the way we do business.

Welcome the Virtual Advisor

The “Virtual Advisor” mindset allows you to retain the tailored service you provide clients while enhancing client interactions via telephone, video conference, and digital tools. The 2020 study by industry think-tank McKinsey highlights the massive opportunities for the financial services firms that embrace a virtual mindset.¹

This virtual framework can help firms offer unsurpassed financial advice, particularly for older consumers with assets between \$250,000 and \$1,000,000 who have been traditionally difficult to service cost-effectively. As clients in this group grow more comfortable using virtual channels, they will inevitably form a profitable core of customers for financial service providers that can deliver quality advice and information digitally.

Tools to Succeed

It is our role to help you keep your clients informed about the issues that could impact their quality of life in retirement. To that end, we have recently refreshed our library of reports so you can continue to use these digital tools to connect with your clients and deliver added value. Through financial education, you can be the catalyst that helps them make better informed decisions about their financial future.

Expanding your virtual footprint is paramount for you to thrive in 2021 and beyond. By moving forward with a virtual advisor mindset, you can continue to deliver substantial value to your clients in a manner that truly separates you from your competition.

1. <https://www.mckinsey.com/~/media/McKinsey/Industries/Financial%20Services/Our%20Insights/The%20virtual%20financial%20advisor/The-virtual-financial-advisor.ashx>



8 Tips for Making A Smooth Transition to Webinars and Virtual Meetings

As the previous article states, the new corona-economy will require all of us to continue evolving and refining our digital marketing efforts. Webinars and virtual client meetings will play an important role in that. That's why we would like to share some tips on things you can do ahead of time to make the most of your webinars and virtual client meetings.

- 1. Familiarize Yourself with the Technology:** There's nothing worse than keeping your attendees waiting at the start of your meeting because the software doesn't load right, or because you can't get the video or sound to work properly. Prior to the actual webinar, you should do a practice run. You could have staff members log in using the same technology your attendees will use so you can test for any potential issues. This one step can help prevent a momentum-killing delay at the start of your event.
- 2. Organize Your Thoughts and Set Guidelines for the Event:** Set clear objectives and create an outline & script that details the topics you want to cover. You should also establish guidelines for how attendees should voice their questions. Asking attendees to hold their questions until the end can help you avoid being interrupted during your presentation. Once you are done, you can ask them to raise their hands virtually or to type their questions into the chat box.
- 3. Keep Presentation Length in Mind:** Remember, during a virtual event, it can be easier for attendees to get distracted. It's important to keep this in mind as you create your agenda or select the topics you plan to cover. Remember, the goal is to bring attention to the problem you can help them address in a concise manner so they're compelled to make the appointment with you. When you do your practice run, make sure to take note of how long the presentation lasted so you can determine if it needs to be trimmed down.
- 4. Use an Icebreaker:** You may think you're the only one feeling nervous during the webinar, but keep in mind that those who might be attending their first webinar or virtual meeting might also feel nervous. A quick light-hearted story that relates to the topic you are covering or a good, clean joke can help put both you and your attendees at ease. Think corny "dad jokes" versus one that could possibly offend someone.

5. **Assign a Facilitator:** Since hosting a webinar or virtual meeting brings new challenges compared to in-person events, you should consider having a staff member serve as the facilitator to help guide the presentation and troubleshoot any issues that might come up. This way the facilitator can focus on managing the technological aspects of your event, and you can remain focused on delivering the content and answering any questions that come up.
6. **Call on Attendees:** Getting attendees to participate without talking over each other can be a challenging aspect of running a virtual meeting or event. If you have a question built into your script, you can call on attendees by name to get their opinion or response. Doing so can help maintain order during your presentation—while keeping attendees interested and engaged.
7. **Capture Real-Time Feedback:** Gathering and processing attendee input during a virtual event can be challenging. Using a short survey at the end of your webinar can help you collect important feedback from attendees about your event. This way, you can any make necessary adjustments for future presentations.
8. **Don't Forget Your CTA:** Always include a clearly stated and compelling call to action (CTA). Whether it's to schedule an appointment, sign up for your monthly newsletter, or take a survey, make sure to take the time to clearly state the action you want your prospects to take. To encourage attendees to stay until the end, you could mention your call to action midway through your presentation. Something along the lines of: "Make sure to stay until the end, because we have a special gift for all attendees that you won't want to miss!"

In the new corona-economy, we need to be our very best in order to continue attracting new prospects. By using these 8 tips for holding virtual events, you can set yourself up for success and continue to thrive.

MegaHit Advisor

Eric Lardner

President



Each month, we like to feature an advisor that's doing great work out in the field. This month, we've decided to feature none other than our newest Income Specialist for the Retirement Income Store, Eric Lardner!

Eric is an Income Specialist based in Dallas, Texas and has been with the Retirement Income Store for a few months. In that short time, Eric is taking advantage of all the marketing programs that we have to offer, such as redesigning his logo and getting involved with our webinars. The staff in our marketing department has been collaborating with Eric to ensure he is delivering the best product to client and prospects in the Dallas area.

Primary Coach Rick Bates had this to say:

“Eric joined us a few months ago and jumped in with both feet on day one. He’s continually learning and perfecting the Sales Process, starting webinars, and is diligently following up with his leads. His hard work will undoubtedly pay off this year as we continue to watch him grow.”

Well done, Eric! We're excited to have you as a part of our team of Income Specialists, and we look forward to you exceeding your goals for 2021!