

# MARKETING MADE

Advisor Success | Market Research | Monthly Updates



## THE YEAR IN REVIEW

### Coming Out of the Storm

The past two years have been turbulent, to say the least. The pandemic completely disrupted our marketing game plans. Suddenly, relationship marketing appeared to be put on hold, personal introductions dwindled, and intimate social events became another Zoom event on the calendar.

The “storm” made us stronger and more adaptable to meet our customers’ needs. We have pivoted well – very well, we must say.

Here’s a recap of how our plans for 2021 were shaped by this ever-changing business landscape – propelling us to think differently and ultimately survive.

### Virtual SGOS 2.0

This past May marked our second – and hopefully last – virtual SGOS.

Filled with fun times and informative presentations, SGOS 2021 did not disappoint. One of the highlights of this year’s event was a presentation given by Erika Wilson, Director of Marketing and Events. Erika spoke about the many new marketing initiatives designed

to boost your digital presence. From our new Published Author Program to Social Media Management and TV Host Branding Packages, we have all the tools needed to elevate your brand. Of course the Virtual Happy Hour and Awards ceremony allowed everyone to enjoy some camaraderie and crowned this year’s Advisors’ Academy Advisor of the Year, Dee Carter!

### Published Author Program

Our partnership with Advantage|Forbes Books allows us to offer a turnkey book program to make you a published author. You will be paired up with one of our ghostwriters, work closely with a skilled graphic designer to create your book cover, and have access to your own Author Program Specialist to guide you every step of the way.



Erika Wilson



## Conquering the Digital Landscape

For generations, financial advice has been primarily about the special client-advisor relationship and the value of face-to-face advice and personalized service. Then came the pandemic, and the industry was shaken to its core. It served as a catalyst for change.

## The Pillars of Change

You already know that most – if not all of your customers are online. In 2021, we helped you meet them halfway through multichannel marketing initiatives designed to engage them in places they're already spending time in.

- **Email Marketing**  
Perhaps the oldest tool in the digital arsenal, email marketing continues to be the low-cost tool that allows you to build relationships with leads, customers, and former customers. It's your opportunity to speak directly to them in their inbox, at a time that is convenient for them. Coupled with the right messaging, email can become one of your most impactful marketing channels. Currently, our marketing team supports over 30 advisor email accounts, delivering tens of thousands of messages on their behalf.
- **SEO**  
As you know, Search Engine Optimization is the process of improving the quality and quantity of web traffic

to your website from search engines like Google. Ranking high on the search engines helps your brand reach a local audience searching for relevant topics. When your website is optimized around end-users, it can be an effective way to drive traffic, and ultimately, new business to your site. SEO is often a marathon, not a sprint, and marketing will be at your side until the finish line. To date, we have helped 20 advisors enhance their websites.

- **Social Media**  
Social Media is now an integral part of our daily life. However, financial services firms have been slow to adopt social media marketing, fearing reputation risk and perceiving a lack of value in social media marketing. Ignoring the power of online word-of-mouth is no longer an option. In a world where a complaint from an annoyed customer can go viral in less than 24 hours, social media has to be taken seriously. In just a few short months, our social media program has grown exponentially, and supports 15 advisor accounts with plenty more in the pipeline.

While all of these digital marketing strategies are strong on their own, they are most effective when integrated into a master plan. Integrated marketing combines traditional advertising methods with digital strategies to maximize return on your marketing investment.

## Looking Ahead

As you say goodbye to 2021, make sure you take the time to evaluate programs you used this year and identify the ones that have been most effective. Begin your plans for next year's marketing campaigns with those that worked well this year, and most importantly, don't hesitate to reach out to us with any questions or ideas on how we can help you make the most of your digital marketing efforts in 2022.



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# MONTHLY MEGAHIT

## Rachel Biggerstaff

Every month, we like to feature an advisor who has been doing exceptional work out in the field. For the final month of 2021, we've decided to feature Rachel Biggerstaff, Investment Advisor Representative and Client Relations Director for Wood Financial Group in Hendersonville, Tennessee.

Rachel has always been in constant contact with the Marketing Team, and over the years she has made big steps forward in her knowledge of the Scranton Sales Process as well. With her constant practice, she has been able to increase her production every year from what was already a high level. Rachel works hard every day to make sure that she's only delivering her clients the best opportunities while also maintaining her drive and persistence when it comes to the Sales Process.

Primary coach Rick Bates had this to say:

*Rachel is a great example of what can happen when an advisor embraces the Scranton Sales Process. Her production is up over 117% when compared to last year, and her last year was already quite high. She works hard at implementing the tools and concepts we espouse here at Advisors Academy and we are proud of her. Nice job, Rachel!*

Well done, Rachel! We look forward to seeing how well you do in 2022, and we're excited to play a part in your success!



# MARKETING MVP... YOUR MARKETING TEAM

While 2021 might have been just the same as 2020 for some of you, it was a period of growth for our team, both with our staff and with the programs we offer. This year, we saw the expansion of our Social Media, SEO, and TV Programs, while continually adding more staff to this great team. We're excited to bring you even more of the Best-In-Class Marketing Programs that we have become known for. To all our advisors, thank you for putting your trust in us, and we look forward to helping you make 2022 your best year yet!

