

hearsay

From invisible to invincible:

How to build a
powerful web presence



Introduction

A good website is easy to take for granted. When you have no problem finding what you need, you're happy to scroll and click with reckless abandon. But what happens when you can't find the information you're looking for, struggle to navigate bad design, or get stuck trying to complete a critical task? You bounce. And not surprisingly, your prospects and customers do, too.

The question is, when did you last consider your own web presence—and what your bounce rate might be?

The pandemic confirmed that financial services professionals can operate their business virtually. From serving existing clients to finding new ones, everything can be done online—and more clients are willing to work with agents and advisors remotely.

In this environment, a strong web presence serves as the anchor of your digital marketing toolkit and can dramatically increase your reach within and beyond your local area.



More than a simple business listing page or social media profile, a website is an “always on” information hub designed to share details about your experience, services, expertise, and values. Prospects and referrals can learn about the services you offer, find answers to common questions, and reach out when they’re ready to connect. A website also helps establish credibility and

authenticity by allowing prospects to get a sense of what it’s like to work with you before they meet you.

Whether you have a dated website that you haven’t thought about for months or years, or you’re just getting started—this guide will help you kickstart or reignite your web presence, attract prospects, and convert them into loyal customers.



Four reasons every financial advisor needs a website

While corporate websites provide basic information about advisors and their services, having your own dedicated website is a game-changer.

A standalone website serves as a “home base”—a place where you can cultivate relationships with prospects and clients. Beyond providing contact information, you can highlight your expertise by sharing commentary and perspectives on relevant topics of interest. You can also highlight upcoming digital and in-person events to give site visitors the opportunity to interact with you.



Four reasons having an individual advisor site offers you a leg up in a competitive online environment:

1. **Branding:** Building your own digital brand lets you separate yourself from your parent company's brand and frees you from the constraints of corporate messaging. It also gives you the opportunity to highlight your unique values, experience, certifications, expertise, and interests—allowing you to differentiate yourself from competitors and make a great first impression on potential customers.
2. **Authority:** Every prospect has specific goals. Having your own website allows you to 'speak their language' and build meaningful connections in a way that reflects your unique value. You can do this by showcasing success stories and providing valuable resources (blogs, videos, social content, webinars, and so on) that educate and inform your audience. As an added bonus, having a well-defined brand and web presence helps you establish yourself as an industry thought leader.

Having your own site frees you from the constraints of corporate messaging while enabling you to highlight your unique experience, certifications, and specialized expertise.

3. **Lead generation:** A well-designed website can serve as a powerful lead generation and conversion tool. By incorporating calls-to-action, lead capture forms, and event registration forms— your website can help you build a sales pipeline on autopilot, saving you time and allowing you to focus on serving existing clients.

4. **Better visibility:** When you launch a site that's purpose-built to maximize search engine optimization (SEO), it becomes easier for prospects to find you online.

By incorporating specific keywords into your website, publishing content focused on topics that are relevant to your target clients, and testing different strategies to see what works best for your business—you can boost your search engine visibility, rank higher in search results, and attract more organic site traffic.

Ultimately, creating your own space in the digital world gives you a secret weapon that makes it easier to attract and convert prospects and retain clients.



The power of a cohesive brand voice

Branding is essential for financial agents and advisors who want to stand out in a crowded marketplace. A website that reflects your unique brand identity and goals helps you rank better in search engines, generate more leads, and build trust with clients and prospects. All these benefits help you build a strong brand that resonates with your audience and supports your business growth.

To build a comprehensive brand story, treat your website as the source of truth and apply consistent language across marketing touchpoints (e.g., social profiles, business cards, email marketing sends, and blog posts). This approach helps you reinforce your unique value proposition, making it easier to attract and retain clients.

It's also important to make sure that your website—and any online presence you maintain—is in line with industry standards. Keeping regulatory requirements in mind will help you avoid potential compliance issues and protect you and your company's reputation.



Think like a prospect to create content that converts

Honing in on topics that address your specific niche audience's needs and concerns and serving up the right content at the right time is an effective way to build meaningful connections and relationships with your target audience.

When creating content, it's important to keep SEO in mind. As you brainstorm what you want to write about, ask yourself an important question: What keywords and phrases are your ideal clients searching for?

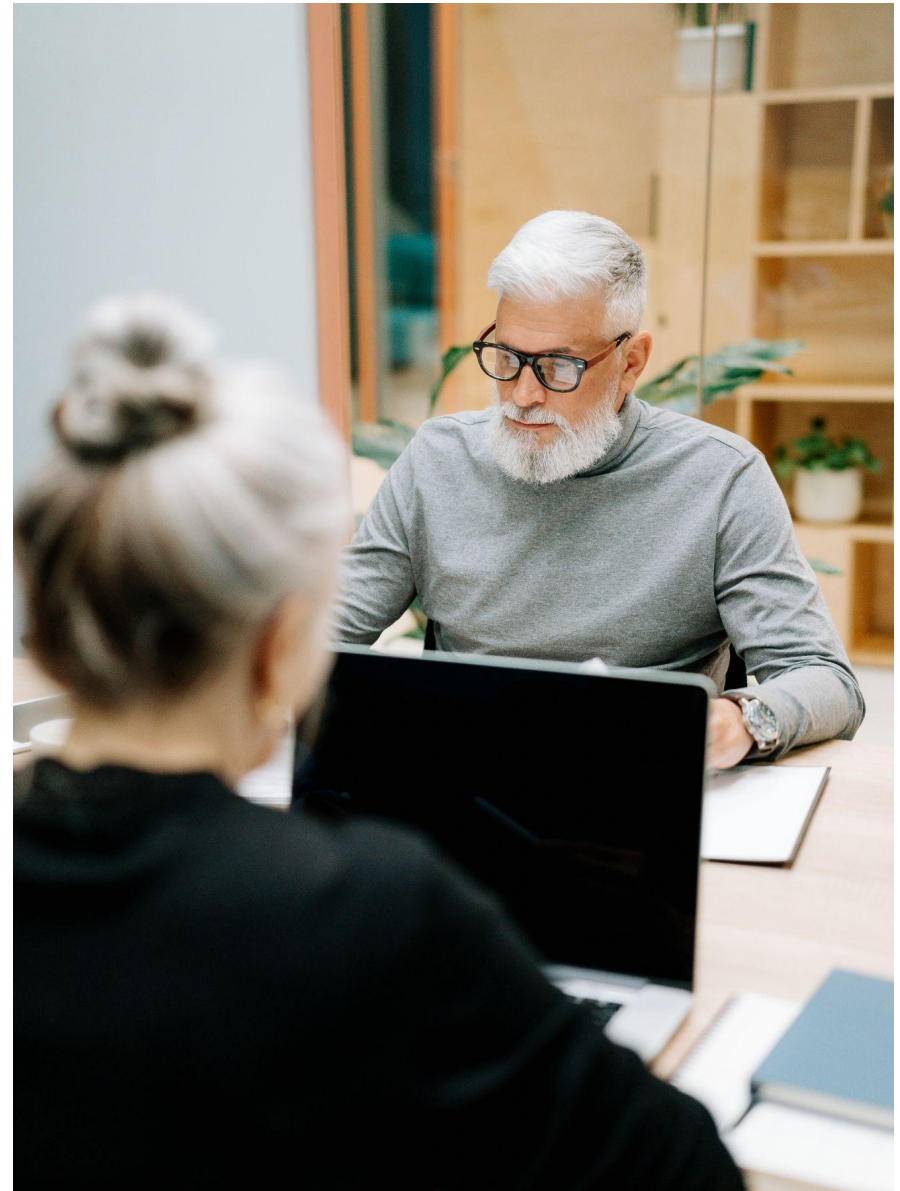
Make a list of impactful topics and include any associated search terms in website copy and blog posts to boost your search engine visibility and attract more site traffic.



Here's a list of niche topics and related keywords to get you started:

- **Retirement planning:** This broad topic can be broken down into posts or content focused on specific areas, such as retirement income planning, Social Security strategies, or tax-efficient withdrawals. Potential keywords include: "retirement income planning," "Social Security benefits," "401(k) rollover," and "required minimum distributions"
- **Investment management:** Financial advisors who specialize in investment management may want to provide basic education around how investing works and how to build a well-rounded investment portfolio. Potential keywords include: "types of investments," "diversifying investments," "investment risk analysis," and "investment portfolio"
- **Wealth management:** Wealth management encompasses a range of services, including tax planning, estate planning, and charitable giving. Potential keywords include: "estate planning," "wealth transfer strategies," "donor-advised funds," and "tax-efficient investing"
- **Financial planning for women:** Women have unique financial challenges, such as the gender pay gap and longer life expectancies. Potential keywords include: "women and investing," "retirement planning for women," and "women and Social Security"

- **Sustainable investing:** Also known as socially responsible investing, this is an increasingly popular area of focus for financial advisors. Potential keywords include: "environmental, social, and governance (ESG) investing," "impact investing," "green investing," and "sustainable mutual funds"
- **College planning:** Financing and paying for higher education can be a challenging process, as can evaluating different savings options. Advisors can help by providing information on what programs are available to families. Potential keywords include: "529 plans," "financial aid," "college savings strategies," and "college planning calculator"

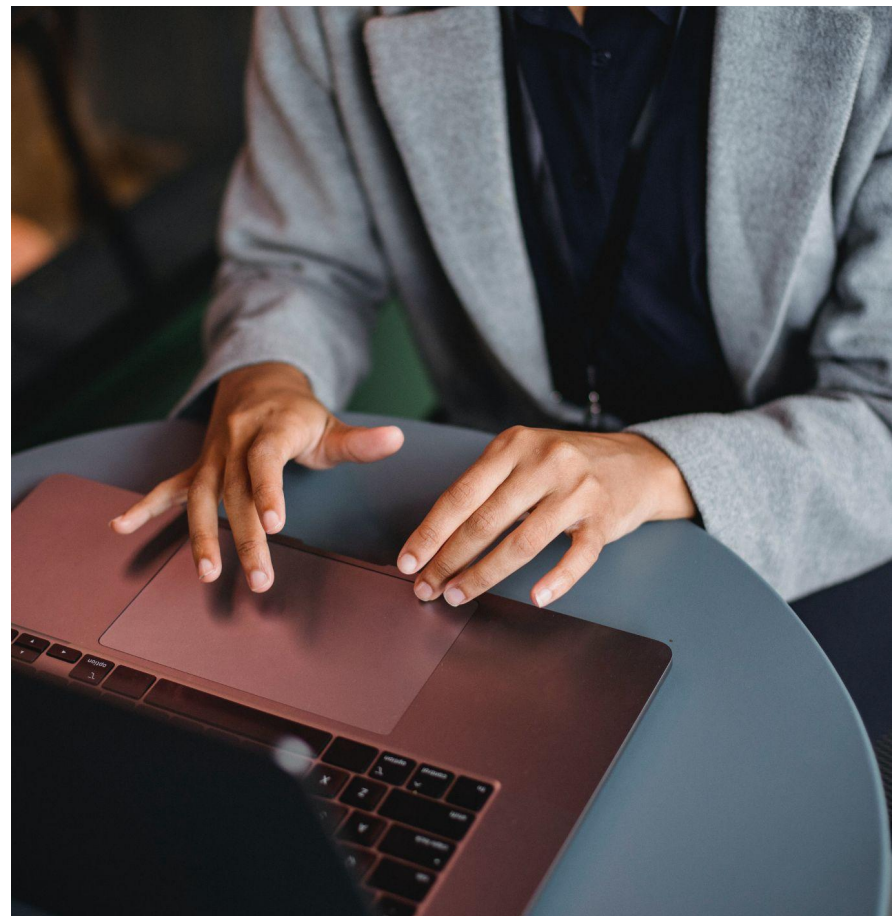


These types of keywords can be incorporated into website copy, blog copy, event copy, and even in social media posts that can be cross-published on your website. They can also be added to your website navigation text and into meta descriptions for relevant pages on your website.

Being prescriptive about your website content—which will be crawled by search engines—will help boost your website ‘authority.’ Authority is a measure of how trusted and valuable search engines consider a website to be. The more authority a site has, the more often it shows up in search results.

There are tons of benefits to a thoughtful content strategy. Just remember, it's important to strike a balance between optimizing content for search engines and writing in a way that's valuable and engaging to human readers. Rather than stuffing your content full of

keywords, focus on creating high-quality content that addresses your client's unique needs and concerns, and use targeted keywords in a natural and organic way.



Use thoughtful content distribution to boost site traffic

Creating relevant content that incorporates the right keywords is just one element of an effective website strategy. You also need to feed and sustain your content engine with high-quality, informative content that resonates with your target audience.

Regularly publishing blog posts, videos, podcasts, and other pieces of engaging content will result in your site ranking better in search results, helping to cement your standing as a thought leader and attract more organic traffic to your site.

Once your content engine is purring along, it's time to proactively market your assets across a range of channels that will help drive website traffic. For the biggest impact, focus on channels your target prospects and customers are already active on.

In today's world, we recommend focusing on building an effective **social media marketing** program first. Regularly posting content on channels like LinkedIn, Twitter, and Facebook gives you a chance to share your perspective, engage with followers, and participate in relevant industry discussions. Providing insights in a bite-sized format via social media also encourages your audience to dig deeper to learn more—by clicking through to a blog post on your website, for example.

If writing blog posts seems labor-intensive, **email marketing can be a powerful tool for driving traffic to your website**. Regular newsletters or promotional emails are less cumbersome to write but still keep subscribers informed, particularly if they're organized around evergreen themes or seasonal topics (think “charitable contributions” or “tax season”).

Referral marketing may be a tactic you already use with your current client base, but there are creative ways to put more wind in your referral sails. Consider offering incentives or rewards for referrals, or ask clients to spread the word about your services by sharing your website link. Doing so will give you an opportunity to reconnect with existing clients while simultaneously driving new traffic to your website.

If you really want to amp it up, use **paid advertising channels like Google Ads or Facebook Ads** to drive traffic from your ideal target audience to your website. By targeting specific keywords, demographics, and interests—you can reach potential clients who are actively searching for financial advice—in particular, the services and expertise you provide.

Ultimately, the most effective method to boost traffic to your website will depend on your specific goals and target audience, as well as the time and resources available to help you take advantage of various content marketing tactics. Using a combination of methods and tracking your results will allow you to build a comprehensive marketing strategy that consistently and efficiently helps you attract and retain clients.



ADVANCED STRATEGY

Increase website traffic by building backlinks

Backlinks are links from other websites that point to your website. These links indicate to search engines that other sites consider your content to be valuable and authoritative. Earning backlinks is essential if you want to improve your search engine ranking.

How do you earn backlinks?

- **Create high-quality, informative content.** When you publish content that provides value to your target audience, other sites are likely to link to it. Original research and data-driven content tends to be highly desirable.
- **Write guest posts on relevant websites.** Identify websites in your niche that accept

guest posts, and pitch them on a topic that would be of interest to their audience.

- **Participate in industry discussions on forums, social media, and other platforms.** Sharing your insights in these discussions can attract the attention of other experts who may link to your website.
- **Serve as a media source.** Offer to provide quotes or interviews to journalists and bloggers to establish your expertise and credibility.
- **Leverage existing relationships with clients, colleagues, and industry experts.** Ask them to link to relevant content on your website or recommend you to other websites that may be interested in linking to your content.

The need for speed: Why quick follow-up is key to converting leads into clients

Once you're producing great content and using the right channels to drive site traffic, it's time to perfect your process for moving site visitors down the marketing funnel. Critical to conversion? Speed to lead.

When a lead fills out a form on your website, they're expressing interest in your services—but that interest dissipates if they don't hear back from you promptly. In fact, studies show that the odds of converting a lead into a sale drop significantly after just a few hours of no follow-up.

That's why it's essential to have a quick and efficient lead follow-up system in place.

Perhaps you use a customer relationship management (CRM) tool to track leads and set reminders for a follow-up call, or maybe you simply have an email template you can quickly personalize and send to each new lead. Whatever system you use, the key is to reply quickly and consistently. Ideally, you want to respond within a few hours—and avoid waiting more than 24 hours before getting back to leads.

The odds of converting a lead into a sale drop significantly after just a few hours of no follow-up.

Optimal website lead follow-up tips:

- **Take advantage of text messaging:**

Following up via text can be highly effective. In fact, studies have found that prospects are up to 4x more likely to respond to a text than to an email or phone call. Just be sure to follow any [applicable regulations or guidelines](#) around texting for business purposes, and try not to come across as too pushy or spammy. With the right approach, a text follow-up can be a powerful lead conversion tool.

- **Aim for authenticity:** Avoid using generic, cookie-cutter responses. Instead, provide a thoughtful, personalized reply. Start by acknowledging the specific inquiry or question that the lead submitted through your website, and write a custom message based on the information provided in the contact form.

For example, if a lead mentions that they're interested in retirement planning, send a guide on retirement planning or invite them to schedule a free consultation to discuss their specific goals.

- **Prioritize persistence:** Don't be afraid to follow up multiple times. You don't want to come across as pushy or aggressive, but it usually takes multiple outreach attempts to convert a lead. Send a helpful message a few days after initial contact and follow up with a quick check-in email or text a week or two later to stay top of mind and increase your odds of earning new business.

Following up with leads quickly and effectively is a critical step in converting website visitors into clients. Having a clear process for handling inbound inquiries, personalizing outreach, and following up consistently will dramatically increase your odds of turning website leads into loyal clients.

REMOVING COMPLIANCE FRICTION

Compliance is rarely straightforward, and building a compliant website can be a stressful—and very manual—process. It's not uncommon for advisors to have to mock up website changes in a test environment, save the modified site as a PDF, and submit it for approval through a third-party workflow.

The next step usually requires navigating multiple rounds of redlining and comment reconciliation with your compliance team. It can take days, or even weeks, to get changes approved and pushed live on your website.

The whole process can be frustrating, especially if you're just making a small change, like updating your office hours or, worse, your contact information.

While you wait, your website may be displaying an inaccurate phone number or address, which is never ideal. So how do you streamline it?

In the financial services industry, the pre-approval process is a necessary evil. Thankfully, solutions exist that lessen compliance burdens and reduce complexity and inefficiency. Imagine a faster approval process.

Instead of initiating a full site review, compliance teams only have to review specific changes, which are highlighted and compared to prior versions.

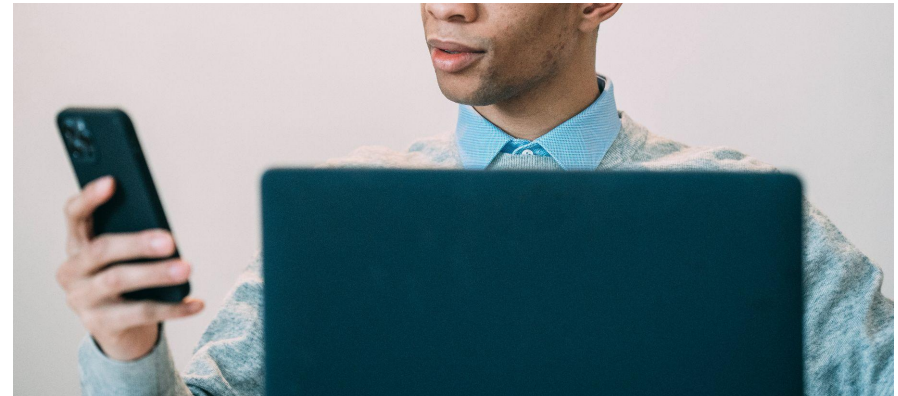
Technology providers that understand these inherent struggles can provide efficiency where others cannot.

Conclusion

To build an effective digital footprint, keep compliance in mind as you execute the steps outlined in this ebook:

1. Build an advisor website that allows you to differentiate your brand from your firm's brand.
2. Create content that is helpful and insightful to your target customer base.
3. Promote your content via optimal distribution channels in a strategic way to drive consistent website traffic.
4. Consistently incorporate lead follow-up best practices to power your conversion engine.

Putting these pieces in place will set you up for scalable, repeatable, long-term business success.



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