ceg worldwide LLC

THE ELITE WEALTH MANAGER

BUILD A SIMPLE AND ELEGANT WEALTH MANAGEMENT BUSINESS

BECOME THE EXPERT THE WEALTHY WANT

ENHANCE YOUR WEBSITE

VIDEO TRANSCRIPTION

John Bowen: Enhancing your website. This is really important. It's one of the things that we see so often that advisors don't do, and they don't do because we're just so busy going up the hierarchy of financial advisor success, is we're racing up. We can only do so many things, but there's an opportunity that we all have as we really put together our elite wealth manager framework as we go through and have success and get all these things in line, there is some real opportunity for us to make sure that all our communication resonates with our audience. And that's really what this module is all about. So, let's take a look at enhancing your website. And one of the key things is a well-designed website, is a must have for all financial advisors. And this is even important for some of you at the wirehouses or your employees of firms where you really are limited.

You want to get the marketing message as close to what you can. So, depending on the flexibility that you have, you want to address as many of the things that I'm going to raise here as we go through. So, everybody's got to have a webpage. The reason is most prospective clients and certainly strategic alliances, they're going to Google you prior to meeting with you and all will tend to do it before they commit working with you. And they're going to find your website, and if your website does not quickly and effectively communicate, you know that you are the expert that that type of client wants to work with, that credibility and expertise in server units, you're going to miss out. Because even though we don't think we're in competition in today's life, we're all in competition. It's so easy to reach out over the internet many explore.

So, we've got a data, all the... Connect all the dots if you will. So, your move to comprehensive wealth management, and you may have been doing this before joining CEG, but it's very likely if you're like other coaching clients who've had the privilege of working with, that there's material changes in your website. We just had to do a recent update of our website because we've made so many changes over the last few years that it was out of date and we let it go a little bit. But the key is, we were, like you, working on moving up the hierarchy. And what happens is it wasn't a high priority. And it should be a medium priority. You want to get the whole elite wealth manager model in place, and then you're really clear on the messaging, then do it.

You don't want to kind of have to do it continuously. It's just too much work. Okay. So, you want to take a fresh look at your website to ensure it's conveying the message now as this elite wealth manager. And sometimes you can do some simple updates and that's great if you can. Other times you have to do a complete overhaul. And if you're working with a major financial institution that puts limits on your design, there's always going to be some small refinements that you can do. And what we're finding is more of the bigger firms are willing to do it as well. So, it's a great opportunity to do it. So, here are the questions I want you to ask for. Is it time for change? Look at your existing website, and does it quickly convey your value promise? You spent all this time on the value promise, you're now clear on who you're working with, who's your primary market?

Okay. And with their big benefit, are you communicating that? And if not, if it's inconsistent, boy, that's a problem. Second, do you have a clear call to action? What's the call to action? Should be a second opinion. This is what you're providing. Or if you chose to brand it, go ahead and brand it. But it's a second opinion story. Also, does it help start conversations? Remember, our goal is a scheduled discovery meeting, but the website isn't going to do it. But you can move people to learn more about your second opinion. Also, here we talk about having a sign up for the flash report. Also, you could have... You'll have our permission and as a coaching client, to post these flash reports as you customize it and get it approved by your compliance on your website. So, you can have a nice monthly flow that's very powerful as well.

Deepen it. Describe your wealth management process. It's all about getting results. You want to, in the value promise, convey how you deliver the experience, which is addressing those five key concerns, making... Helping them make smart decisions about their money, mitigating taxes, taking care of the heirs, protecting the assets from being unjustly taken through litigation divorce and magnifying the charitable gifts. Now you can use your own words in that, but that's the framing that we see in the wide affluent market. Might be a little different in your niche. So, communicate that. But also, then, they want to know the results, which is a value promise. And then how are you going to get there? They want a clear and compelling process. And one of the big things is evoke emotion. And this can be through your personal story.

There's a number of ways to do it. But you know what we... Everybody's so busy and they only have a few minutes when they come to your website. You want to inspire them to action. Also, don't be hesitant and given the background on your team, you want to show your team and again, if your firm lets you do it, you may even want to put your professional team here, too. Do you make it easy to reach out? And this is again, the contact us information and having a Google map, the office location, so powerful. Is it visually appealing? Does it look upmarket? Does it reflect the market you want to work with? Is it easy to navigate? And right now, I was amazed. I don't remember the statistic off the top of my head. But I think the super majority of looks at our website, our mobile, and we're seeing more and more people use their smart phones, or iPads, or tablets and to reach out and you want to make sure that it looks good on those vehicles, devices.

Can people find... Search engine optimization. Can... When they search in your, particularly in your local market, are they going to find you? And if not, and depending on your business, you may even want to have somebody help you with this because this can be very powerful. And so those are the enhancements that we would recommend that you look at. Very often, you're going to have to engage a professional to do this. And if you can't locate a professional in your market, you can go referrals from colleagues, peers, your peer coach potentially or some of the members. Also, we have in the resource section, we have a number of virtual ones you can reach out to. And then, as with any marketing material, you got to keep in mind that your compliance professionals have to be involved.

But those are the key things that I would have you do if, you know, when you're ready. Once you've gotten the elite wealth manager model largely and you're really clear on the messaging, then go and do the website. Then the other thing though, I'd want you to do almost earlier, is maximizing LinkedIn. Now you got to get clear still on the messaging, but once you're clear, this is one that it's easy to update. You can do it in a couple of hours for most people, maybe even less. And it's very powerful. So, let's... Join me in the last of becoming the expert your clients want module on LinkedIn. I'll see you there.