



E-BOOK

# Rewriting the Rules of Engagement for the Modern Financial Services Client



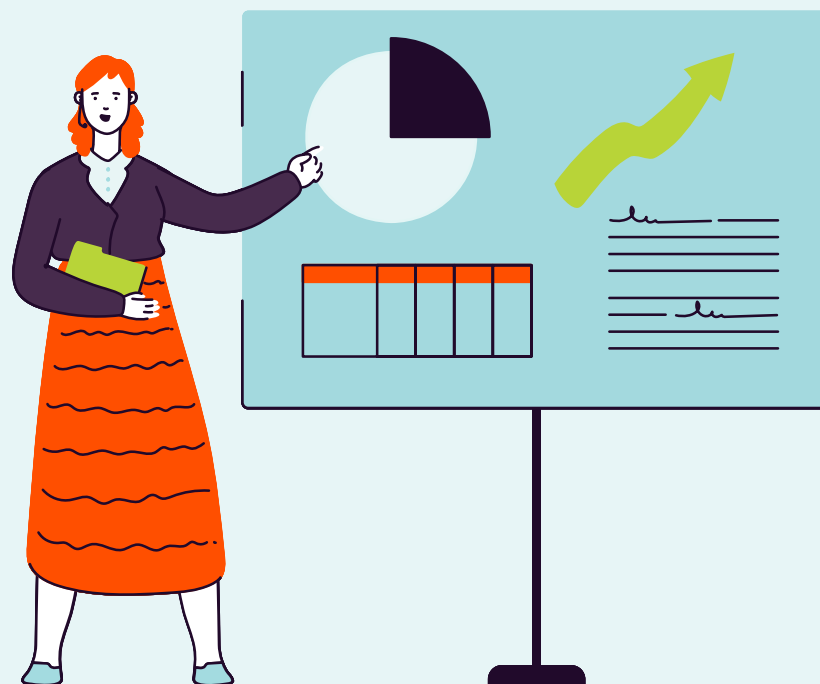
# The way clients seek advice has changed

The bar for financial services experts has been raised. What once might have dazzled a wide-eyed potential client seeking advice simply won't cut it anymore. That's because, as is the case across all industries, clients now know more about the services they need long before they contact an expert.

With so many online resources at their fingertips, clients can conduct extensive market research, competitive analyses, and price comparisons all on their own. So, when they finally reach out to an advisor, they already know a lot—and what they want to know is much more substantial.

That means the level of expertise an advisor needs to demonstrate when first speaking to a potential client is higher than it used to be. And falling short of that client's expectations by telling them things they already know can easily make for a lost opportunity.

To meet the expectations of today's financial services client, advisors need to reach out to them, not the other way around. Advisors need to intercept clients' attention by proactively providing them with the knowledge they're looking for early in their journey by using content that educates and engages them. Only then can an advisor ensure they're the expert a client will reach out to when the time is right.





# Giving clients what they want

As mentioned, clients can find a lot of what they're looking for on the internet. Not only is that more convenient for them, it's also a necessity with fewer in-person meetings happening due to pandemic restrictions. And for many, even when restrictions subside, the convenience of researching and interacting online will not.

With no shortage of content for clients to find, the challenge is getting them to engage with yours.

So, how do you do that?

**56%** of financial clients read online content;

**70%** when looking at younger, tech savvy clients.<sup>1</sup>

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<sup>1</sup>[https://www.accenture.com/\\_acnmedia/PDF-95/Accenture-2019-Global-Financial-Services-Consumer-Study.pdf](https://www.accenture.com/_acnmedia/PDF-95/Accenture-2019-Global-Financial-Services-Consumer-Study.pdf)

# Connect with them



# Meet them where they are

Meeting clients where they are doesn't just refer to serving up content on the platforms they're frequenting. It also means providing them with subsequent pieces appropriate for each stage in their journey.

Social media sites are bustling with clients ready to have conversations. Unsurprisingly, the platform most used by financial services clients is LinkedIn; however, other platforms are becoming more popular.

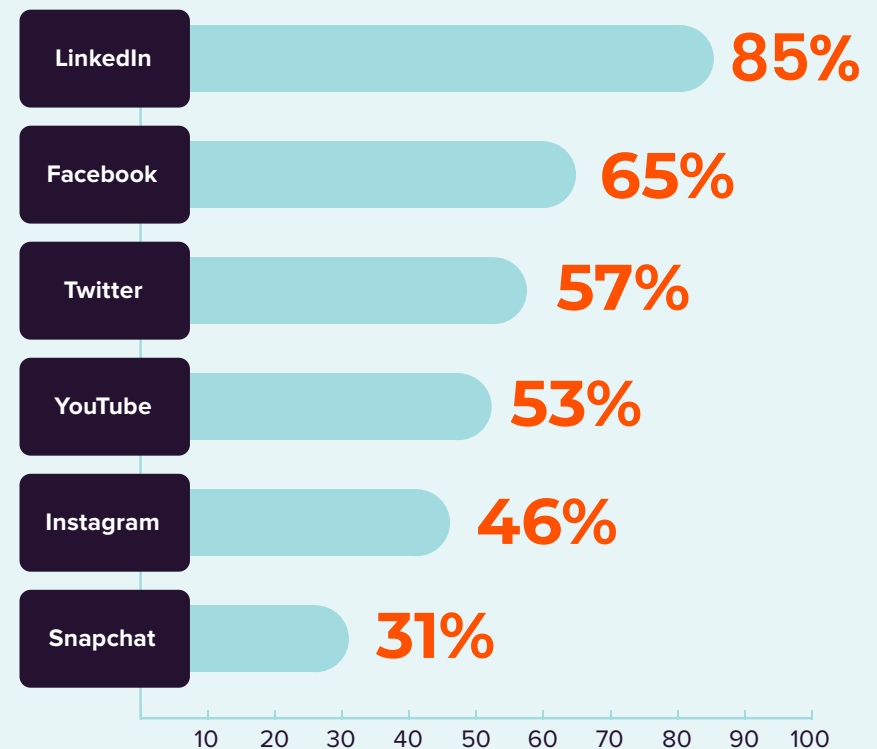
Social media provides advisors the opportunity to broadcast a piece of content, capture the attention of a select portion of a network, and focus in on them, finding out where they are in their journeys and presenting them with subsequent information that will help them progress. By doing this, advisors sow the seeds of long-term relationships based on their expertise and the trust that comes with it.

<sup>2</sup> [https://www.accenture.com/us-en/insights/interactive/\\_acnmedia/Thought-Leadership-Assets/PDF-3/Accenture-Interactive-Business-of-Experience-Full-Report.pdf](https://www.accenture.com/us-en/insights/interactive/_acnmedia/Thought-Leadership-Assets/PDF-3/Accenture-Interactive-Business-of-Experience-Full-Report.pdf)

# 94%

of successful advisors use direct messaging capabilities on social platforms.<sup>2</sup>

Breakdown of social media platforms used by advisors as of 2020:<sup>2</sup>





**67%** of investors prefer financial advisors who offer mobile apps and interactive tools.<sup>3</sup>

## Capture their attention

Knowing where clients can be found and having the right content for them still isn't enough. Clients are inundated with content, so getting them to engage with yours means standing out in the crowd.

Content should tell a story in which the client is the hero. That means personalizing content whenever possible and directly addressing the challenges they have in achieving their financial goals.

It's also vital to make sure some content is interactive. Such content is highly visual and dynamic, presenting the client with options on what to consume according to their own needs. It's about giving them something to explore, not just read or watch.

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<sup>3</sup><https://www.salesforce.com/ca/solutions/industries/financial-services/financial-services-cloud/>



# Guide them



# Educate, don't sell

Capturing a client's attention is one thing; keeping it is another. Not only does content need to be informative and insightful, but it also needs to have the right tone.

Always take a consultative tone. For your average client, financial jargon is intimidating and alienating. Messaging needs to be simple to be accessible. Only then can an advisor come across the way they should: as an approachable expert ready to build a reliable relationship through which a client can achieve their goals.

## Build trust

The more an advisor can provide a client with the information they need when they need it, the more that client will see the advisor as a guide to their success.

Credibility is key, and that means more than simply supporting claims with spreadsheets. By connecting with clients where they are, winning their attention, and helping them navigate their way to a solution, advisors are more likely to be approached for future discussions about a client's emerging needs.





# Be Confident





## Stay on-brand

A financial institution's brand is foundational to its reputation, and content is where clients familiarize themselves with a brand. Unfortunately, advisors all too often take their organizations' brands into their own hands, leading to inconsistent and/or out-of-date messaging.

Value propositions and tone of voice are just as important as a memorable logo. To confidently share content with clients and solidify a good reputation in their minds, advisors need these elements to be consistent across every piece.

## Ensure compliance

Perhaps nothing can damage a brand more than legal troubles. In addition to keeping visuals, tone of voice, and value propositions consistent across content pieces, mitigating regulatory risk is a given.

To avoid fines and other more detrimental judgments, the information presented across content must always be correct and adhere to regulatory guidelines.



# The lines between go-to-market teams have blurred

Getting clients to engage with content requires advisors to act more like marketers.

Traditionally, marketers focused on higher-funnel tactics, such as web content, social media, and paid media, to generate leads while advisors owned lower-funnel face-to-face interactions. But with the rise of more knowledgeable clients, and the rise of rich content as a response to them, this distinction isn't as clear as it used to be.

Enablement is a function that has developed to bridge this gap by taking the content that marketing creates and providing it, along with training and tools, to advisors so they can have valuable conversations throughout the client's journey.

Together, marketing, enablement, and advisors comprise a go-to-market engine. But for many organizations, this engine has stalled and needs serious repair.

# The new world of financial services requires new tools

Every team that makes up the go-to-market engine faces its own challenges, compounding the struggle to find, entice, and engage clients.

Marketers lack a single system with which they can create, manage, and distribute their content. They also have difficulty demonstrating how their content has performed, particularly in acquiring more clients.

Enablement has a similar dilemma. They not only grapple with how to deliver the collateral, training, and coaching advisors need to talk to clients, but they also struggle to measure the effectiveness of their efforts with both audiences.

Advisors spend hours looking for the content they need to engage with clients, often coming up short with outdated or barely relevant material. They also have no way of knowing whether the content they presented has resonated, making it difficult to follow up appropriately.

It's time for a solution that can directly address the needs of these teams.



# It's time to rewrite the rules of engagement for the modern financial services client

Meeting the demands of today's client means empowering go-to-market teams in the following ways:

## Marketing



Manage content planning with full visibility of milestones and deadlines, and replicate existing campaigns and workflows to go to market faster.



Craft and manage integrated campaigns, from planning to execution, all in one place with calendarized tasks and assets, and with proofing to ensure compliance.



Gain insights into how tasks, content, and campaigns impacted the business—especially revenue—and audit underperforming pieces to quickly improve future results.



Centralize information from disparate sources to automatically populate and update various pieces of content in an instant.

## Enablement



Make content interactive, creating immersive experiences that allow clients to drive the conversation, and make that content easy for advisors to find using an accurate search engine.



Onboard and upskill new advisors faster so they're more productive sooner, and align their content and their learning with client interactions for better conversation guidance.



Control permissions so advisors only see the content they need based on what they sell, and stay on-brand with automated workflows and approvals before distribution.



Learn what's resonating with clients, prioritize follow-ups, identify risks, and derive best practices as a result.

## Advisor



Reach clients through social media, text messages, email, and more with an intuitive, compliant mobile-first platform that makes it easy to find, personalize, and schedule content in minutes.



Identify prospects for relevant content and gather analytics throughout the engagement to understand ROI.



Mitigate security, policy, and compliance risks quickly and easily with automatic checks prior to content sharing.

**Are you ready to change how you engage with your clients?**

Speak with one of Seismic's expert to get started.



## About Seismic

Seismic is the global leader in enablement, helping organizations engage customers, enable teams, and ignite revenue growth. The Seismic Enablement Cloud™ is the most powerful, unified enablement platform that equips customer-facing teams with the right skills, content, tools, and insights to grow and win. From the world's largest enterprises to startups and small businesses, more than 2,000 organizations around the globe trust Seismic for their enablement needs. Seismic is headquartered in San Diego with offices across North America, Europe, and Australia.

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