



Turning PRESS Into PROFITS

ADVISOR EDITION: A PR Guide For Financial Advisors

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ABOUT THE AUTHORS

FOREWORD BY MARK MERSMAN

Imagine that you are about to deliver the biggest presentation of your career. You know your material cold. You've practiced the presentation dozens of times. You have dressed the part, because you know that you never get a second chance to make a first impression. Right? Wrong.

For most successful professionals, the moment they step on stage for that presentation is the exact moment they are already getting a second chance, because their first chance was delivered to the audience well before they stepped on stage. It's called third-party credibility, and it is your chance at making a first impression before you even step on stage.

Every one of our parents or grandparents has likely told us not to judge a book by its cover. In other words, they tell us not to make split-second assessments of people based on outward appearances. While we all may strive to avoid being judgmental, it is human nature for us to judge. In fact, in many ways it is a survival tactic and a defense mechanism. As professionals, it is imperative that we understand human tendencies and capitalize on them accordingly.

We are all guilty of forming opinions about people before we've even had the chance to meet them. As a professional, it is imperative that you stack the deck in your favor so that those pre-formed opinions about you are favorable and position you as a thought leader within your industry. This is the power of establishing third-party credibility. This is why you must understand and capitalize on the three different media silos available. Integrating PR into your marketing plan is not optional – it is essential to your success. While PR has evolved over time, one thing has remained the same – the media actually needs you as badly as you need them.

All the best,
Mark R. Mersman
Chief Marketing Officer, USA Financial
Co-host of the nationally syndicated USA Financial Radio Show
Co-contributor to four audiobooks, including *The Retiree's Guide to Retirement Income Planning*
Grand Rapids, Michigan

Mark Mersman is an investment advisor representative of, and securities are offered through, USA Financial Securities, 6020 E. Fulton St., Ada, MI 49301. Member FINRA/SIPC (finra.org) and a registered investment advisor.

INTRODUCTION

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We live in an era where customers increasingly demand trust, transparency and credibility from the professional services firms they consider for hire. In financial services in particular, those demands are intensified beyond just about any other industry.

In response to this new business climate, the most successful financial advisors are changing how they position their brands. They are now earning recognition as influencers, thought leaders and local celebrities to win the attention and respect needed to thrive in this environment.

Long gone are the days where traditional prospecting methods like local advertisements and cold-calling alone could consistently create and convert quality leads. With digital communication shifting the sales process, those dated methods are being pushed aside, and rightfully so, in favor of integrated public relations and digital marketing campaigns.

This e-book is your guide to understanding and implementing a marketing plan for your practice centered around earning and leveraging third-party credibility, thus turning press into steady profits. Throughout, we will discuss the key elements you need to create a meaningful presence in the news while effectively using that coverage to influence your target market.

LET'S GET STARTED.

PART I: EARNING THIRD-PARTY CREDIBILITY

1 Why Third-Party Credibility Is Crucial For Financial Advisors

- a. Legitimizing Your Brand
- b. Building Trust
- c. Expanding Visibility

The financial services marketing landscape favors advisors who can consistently build trust, transparency and engagement among their target markets. Credibility is the key to capitalizing on this trend, so advisors must now rethink how they promote their brands to thrive, or, at the very least, survive under these standards.

As stated in the introduction, in years past, sales-driven practices like local advertisements and cold-calling could adequately generate leads in a cost-effective manner. That is because those methods were how consumers were accustomed to being introduced to local or industry products and services prior to the social media and smartphone age.

Today, technology has ignited stark changes in consumer preferences and behaviors. Prospects no longer want to be sold to; they want to be engaged, educated and even entertained when being marketed toward. Investors want financial advisors to demonstrate a reputation and level of credibility worthy of their business. They also expect to be able to find information online about the companies they work with – not just on business-owned properties like a company website and social media pages, but also on third-party resources like news articles and business directories.

“At the core of it, customers want financial advisors to demonstrate third-party credibility – recognition, associations and acknowledgements from respected entities outside of that organization.

Third-Party Credibility Includes...

- ✓ Press Coverage
- ✓ Published Work
- ✓ Awards & Recognition
- ✓ Speaking Engagements

Legitimizing Your Brand

When it comes to marketing your practice, you can try to tell the world how great you are, and possibly even have some success with that strategy, but the most successful advisors go beyond self-promotion and elevate their status by earning legitimacy through public relations.

First off, there are plenty of ways to add legitimacy outside of PR. Forming an LLC, registering a trademark, building a quality website, renting professional office space and so forth are all ways to build legitimacy outside of public relations.

But if you want to earn legitimacy through third-party credibility, you will need to add PR to the mix. Media coverage, awards and other recognition can carry an enormous amount of clout and credibility. If strategically garnered, it will strengthen and legitimize your sales and marketing claims, driving new sales inquiries and improved conversion rates.

Building Trust

In financial services, trust is paramount to modern marketing success. By showing prospective clients that outside entities trust and respect your business, you can ease and eliminate credibility concerns. In short, the more your potential clients trust your experience and abilities, the more likely they are to choose you or your practice over your competitors.

The value of press coverage, for example, goes beyond the message or article focus. Readers and viewers tend to trust the outlets they subscribe to. So when those outlets give you or your company positive coverage, they are in many ways aligning their brand with yours, having an impact similar to an outright endorsement.

Failure to establish trust within your target market can stifle sales growth and limit long-term business success. On the other hand, by weaving elements of trust into your brand, you will directly appeal to a deciding factor among prospective clients.

Expanding Visibility

Earning media exposure and recognition expands a brand's overall visibility. It puts them in front of new audiences and, if earned regularly, can begin to have a "household name" effect on these audiences.

With that said, it's important to understand that being quoted once as an expert in a local newspaper article won't automatically make your phones start ringing with business opportunities. However, gaining steady exposure in the paper over time will prompt readers to remember your brand and recognize you as someone both local and knowledgeable.



A good public relations strategy will reach new, targeted audiences by using the media to amplify your brand, experience and core messaging.

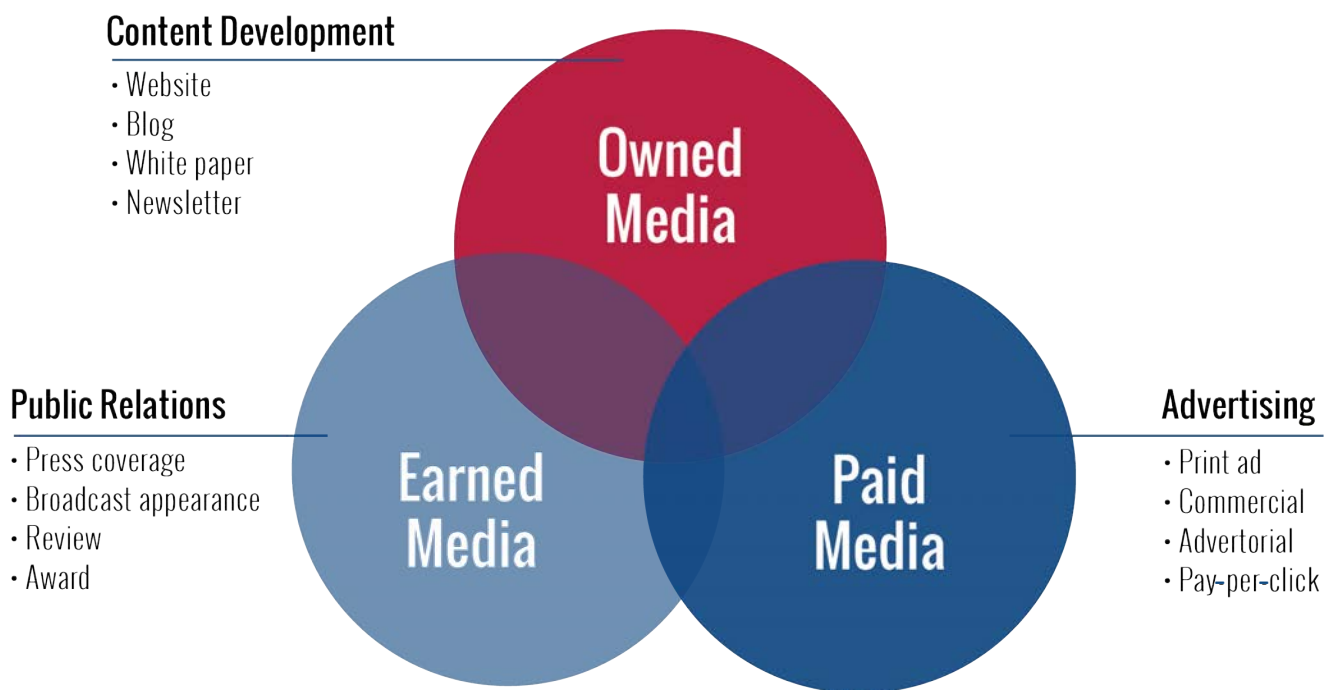
2

Understanding Media Silos

- a. *Earned Media*
- b. *Owned Media*
- c. *Paid Media*

“Media” is an umbrella term covering any number of mass communication channels. Traditional media includes television, radio and print publications while new media includes social media, digital media and other forms of on-demand content.

In marketing, media can be separated into three buckets: earned, owned and paid. Below is a breakdown of each:



Earned Media

Public relations efforts are traditionally geared toward earned media, which is a mention, feature or other acknowledgement in a news outlet or other third-party medium. Unlike paid advertising, earned media is often merit-based and therefore often carries more credibility than the other two media types.

“ Think of it this way: advertising is the static wedged in-between the content viewers seek, while earned media puts you right inside the content. The fact is, apart from the Super Bowl, viewers typically don’t watch TV for the commercials – they watch for the primary programming.

Because of this, earned media can be the most difficult to obtain, which is why most companies with strong earned media campaigns often have in-house PR specialists or hire an agency to drive their campaigns.

Owned Media

Owned media is any media that you or your business creates, owns and distributes through channels such as your website, blog, newsletter and social media accounts. With owned media, you are in full control of the content, but that also means you will not enjoy the added value of third-party credibility.

Technology, and the rise of social media in the business community, has proliferated the importance and effectiveness of owned media while reducing its cost. Brands are now publishing whitepapers on their websites, writing about current events on their blogs, hosting their own podcasts and even streaming live video to their social media followers.

Owned media is most effective when it resembles unbiased information rather than marketing materials pushing products and services. It's also important that the content be consistent in style and frequency. That is what allows financial advisors to build regular audiences and fans.

Paid Media

Paid media is most often referred to as advertising. It can essentially guarantee visibility in selected outlets and platforms, but it often comes with a hefty price tag and fails to produce the third-party credibility you get with earned media.

Paid media can take many different forms. Broadcast commercials and print advertisements have been the most prolific forms of advertising over the past many decades, but new technology and digital media platforms have created countless other forms of paid media. Advertorials (newspaper or magazine advertisements written in the style of a journalistic article) and native advertising (an online version of an advertorial) are popular types of paid media because they mimic earned media. And search engine marketing, paid social media marketing and other forms of online advertising continue to grow in popularity year over year.

As with other marketing strategies, paid media typically requires a long-term commitment (and budget) in order to produce worthwhile results. Financial advisors that arbitrarily spend on advertising without clear goals or a documented strategy are often disappointed with the results.

3

Am I Newsworthy?

a. Becoming A Trusted Source And Subject Matter Expert

b. Sharing Thought Leadership

c. Highlighting Company Announcements

Many financial advisors who do not prioritize public relations hold the same false belief – they don't think they're newsworthy. The fact is, every single one of them is newsworthy in their own right, and establishing PR success comes down to identifying the most press-worthy aspects of the practice and effectively presenting those to the proper media outlets.

Here are three of the key types of media opportunities most financial advisors can pursue.

Becoming A Trusted Source And Subject Matter Expert

Whether it's retirement planning, tax planning, estate planning or any number of other services, you likely hold deep knowledge and experience in one or more specific areas of your trade. Believe it or not, there are reporters, producers, bloggers and other media professionals constantly looking for subject matter experts like yourself to serve as trusted sources for their stories.



This is a win-win dynamic. On the one hand, you have media professionals who must constantly find new story angles, as well as expert sources who can share color and insight around those topics. On the other hand, you have financial advisors looking to earn third-party credibility and expand their visibility by being featured in the media. Most of the time you will have a public relations specialist or agency in the middle to facilitate those mutually beneficial relationships.

Another dynamic to serving as a subject matter expert is that, over time, the media will often begin to seek you out if they enjoy your commentary, ideas and perspectives. There is a popular line in the PR community: media gets media. It's

important to understand, however, that this avenue to earning third-party credibility is very much momentum driven. The advisors who experience the most success as subject matter experts make it an ongoing part of their company cultures and brands, not something they turn on and off at will.

Sharing Thought Leadership

The demand for digital media over the past decade has created new opportunities for professionals to share thought leadership on third-party sites through contributed content. While newsrooms across the country have been getting smaller, the demand for digital content continues to grow. Because of that, many outlets have created platforms to contribute online articles – often for free.

[*Forbes.com*](#), for example, was one of the first notable news outlets to launch one of these platforms, and it remains one of the most robust and successful. They invite professionals in various fields to regularly contribute articles. Forbes gets loads of free, quality content, and their contributors have a powerful platform to share thought leadership while aligning with the Forbes brand. Numerous outlets have followed suit, creating fantastic opportunities for professionals with the talent and motivation to capitalize on them.

Sharing thought leadership on third-party sites is an excellent way to distinguish yourself as an industry and community leader. Beyond the added credibility of being selected as a contributor to *Forbes*, *Entrepreneur*, *The Wall Street Journal*, or any other number of publications that accept contributed content, it allows you to build a steady, influential presence in front of a targeted readership.

Here are links to 6 popular business publications that accept submissions:

[*Entrepreneur*](#)

[*Inc.*](#)

[*Business Insider*](#)

[*Fast Company*](#)

[*AllBusiness*](#)

[*Harvard Business Review*](#)

Highlighting Company Announcements



Benjamin Franklin once said, “Write something worth reading, or do something worth writing about.”

Certain media outlets, particularly local and industry press, regularly cover company announcements. So if you or your practice have opened an office, relocated, added a new service, launched a new product, hired someone or celebrated an anniversary or milestone – chances are you did something newsworthy. The catch is, unless you are a major corporation, the press will rarely pick up on these items on their own. They depend on companies to present that information themselves, organized in a press release or other formal announcement.

Too often, financial advisors fail to capitalize on these opportunities, and they let their practice’s accomplishments go unnoticed by the public. This goes back to the point we covered earlier — too many advisors mistakenly believe they are not newsworthy. The fact is that you are newsworthy, but it takes an action plan to let your industry, community and prospective clients know your news.

4

How Google Measures Third-Party Credibility

a. The Importance Of Local SEO

b. What Google Wants

c. Taking Control Of Your Search Results

Not only is third-party credibility important for your brand and overall reputation, but it proves to be increasingly important to your search engine optimization (SEO) efforts. Search engines like Google are in the business of relevancy, meaning their users count on them to produce the most relevant results for a given search term. In years past, you could hire an SEO firm to trick Google into determining your website to be relevant through methods like keyword stuffing (repetitively embedding one or more search terms throughout a site in a way that offers little value to visitors) and spammy link building schemes (posting website backlinks on a large number of external sites, often done in the comments section of blogs and articles).

Today Google is far too sophisticated for those tricks, and it will even penalize websites caught implementing those methods – the most severe punishment being removing the site from the index altogether. So if someone tells you they can outsmart Google, you should be concerned.



Rather than trying to trick Google, you should focus your efforts on revealing your true relevancy, and earning third-party credibility can play right into that strategy.

The Importance of Local SEO

Local SEO is perhaps one of the most impactful digital strategies for small to mid-sized businesses who serve a local or regional clientele. Google's search algorithm will modify results depending on the location of the user, often giving preference to business websites near that user. By understanding and implementing best SEO practices, your practice can begin competing to appear on the first page of those local search results.

Securing a spot on the first page for key search terms in your area can open a new sales pipeline for your business. More and more businesses and consumers rely on Google search to research local financial firms and professionals. So, for example, if you're an advisor in Pittsburgh, you want to show up on the first page of results for "financial advisors in Pittsburgh." If you don't appear on that first page, your chances of being discovered and generating search engine leads become slim.



Our current on-demand culture will only continue to drive prospective customers to Google as a means of identifying and researching businesses and professionals. That means if they cannot find you in a simple search, you do not exist to a growing segment of the population. If and when you do start to rank on the first page of results, you will have a distinct advantage over each competitor you outrank.

What Google Wants

As established earlier, Google is looking for legitimate signs of relevancy for each site in its index. It looks at technical factors like site speed and quality of coding. It looks at user experience factors like ease of navigation and mobile optimization. It also takes into account the quality of the site's content and how often it's updated with new content. But some of the most potent factors in revealing a site's relevancy to Google go hand-in-hand with establishing third-party credibility.

Earning backlinks from high authority websites can have an enormous impact on your overall SEO success. For example, if you were to land a regular contributor role on a popular website, and each article you submit includes your bio and a link to your website at the bottom, each article you publish will in turn give you a new backlink from that website. Those backlinks serve as an endorsement of your site from the sites they are secured on. In addition to the SEO value they provide, those backlinks will also drive referral traffic to your website from interested readers who click on the link.

“High-quality, high-authority links are hard to fake, and that's why Google values them as an indicator of a site's relevancy. They are also difficult to earn without a solid public relations plan. Even SEO specialists have a hard time earning these links because they typically do not have the relationships with media producers, editors and reporters it takes to generate these high authority backlinks on a steady basis. That takes public relations.



Taking Control Of Your Search Results

SEO is important for helping potential clients find you on the web, but it's also important to know how to take control over what shows up when they Google you or your company name directly.

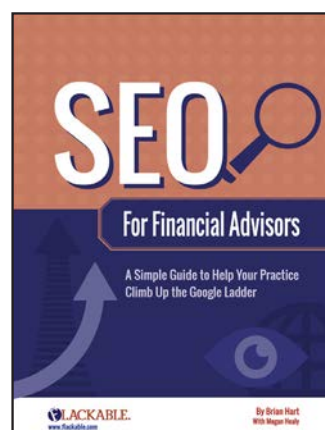
This is called "taking control of your digital footprint." Ideally, when a person enters your name or your business into a search engine, your website will appear at the top followed by other pages and profiles you created. If that's the case, it means you are currently in control of your digital footprint.

However, if irrelevant pages, bad reviews, bad press or other unwanted results show up on the first page, you have a problem that will likely confuse or even turn away potential clients. Public relations can be used to solve this problem by creating positive content about your brand on high-ranking, third-party sites to replace the unwanted or damaging results. The best course of action is to be proactive and take control of your digital footprint before there's a problem, rather than trying to address it after something negative surfaces. If something negative does surface on the first page of results, it is important to hire an SEO-savvy PR expert to promptly address the situation.

**For a more in depth look at
SEO, consider downloading
Flackable's e-book:**

SEO for Financial Advisors

FLACKABLE®



PART 2: LEVERAGING THIRD-PARTY CREDIBILITY

5 Integrating PR Into Your Greater Marketing Plan

- a. *The Issue Of Marketing Fragmentation*
- b. *The Solution: Integration*
- c. *Why Leveraging Credibility Is Vital*

Effectively integrating PR success into your greater marketing plan is what translates third-party credibility into bottom line results. So while the first part of this e-book focused on earning third-party credibility, this second part focuses on leveraging that third-party credibility.

The Issue Of Marketing Fragmentation

“Marketing fragmentation occurs when a brand’s marketing efforts are divided into distinct and disconnected silos, such as email marketing, social media, advertising, public relations and so forth. That approach often creates a dynamic that lacks cohesion, produces inconsistent messaging and fails to maximize the impact of the collective efforts.

Those problems are magnified when brands use multiple vendors to carry them out, which is quite common among companies of all sizes, but it seems to take the biggest toll on small to mid-sized financial and professional services firms, as these firms can rarely afford the resulting waste of time and money.

The problem with this approach, particularly for financial advisors, is that they are often unable to effectively manage all of the various vendor relationships. In addition to the amount of time and money required, the resulting marketing fragmentation can dilute or derail a campaign’s overall effectiveness.

The Solution: Integration

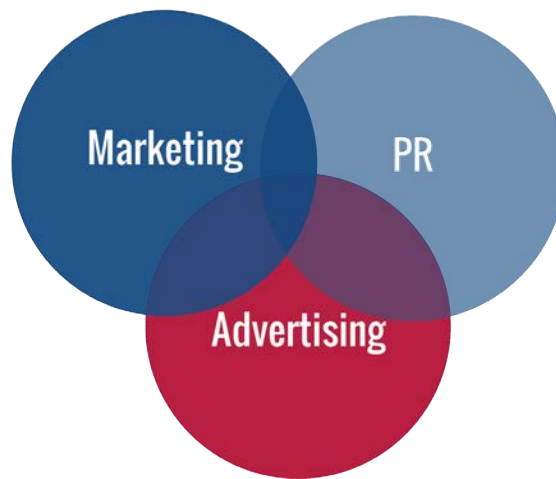
The solution to fragmentation is integration – where marketing, public relations, advertising and similar strategies work together toward common goals rather than being siloed off. Synergy among these efforts is crucial for businesses to thrive and maximize the value of their marketing time and dollars. Consistency cannot be achieved if vendors fail to pool their efforts toward the overall business goals.

Partnering with an integrated financial public relations agency such as [Flackable](#) – that offers PR, digital marketing, content development and website design services – can help you eliminate fragmentation and maximize your marketing efficiency and success.

Fragmentation



Integration



Why Leveraging Credibility Is Vital

Leveraging third-party credibility is what turns press into profits. Many financial advisors who have not previously engaged in a PR campaign have a false impression that earning press mentions alone will directly result in new business. While it certainly can, it is often a shot in the dark and a flawed and narrow way to look at PR.



When effectively leveraged through new and existing marketing channels, PR success can and will push the sales needle for these advisors.

Some clients find it rather intuitive to leverage third-party credibility by integrating it into their greater marketing plans. Most, however, need help identifying ways to best leverage press coverage and other campaign successes.

Leveraging third-party credibility is vital because it funnels those positive elements to a targeted audience. For example, a write-up on WSJ.com is a terrific press win, but if you're a financial advisor in Cleveland, what are the chances your local prospects will find that article on their own? In the next two sections, we'll discuss modern and traditional ways for leveraging third-party credibility. These sections will offer solutions for maximizing the value and visibility of those placements and other forms of third-party credibility earned throughout a PR campaign.

6 Modern Methods For Leveraging Press

- a. *Creating A Press Page, Banner And Slider On Your Website*
- b. *Sharing Press Coverage Across Social Media*
- c. *Sending Media Hits To Your Email Lists*

Today's online, on-demand culture has pushed modern marketing strategies to go digital. Whether or not your leads originate online, your digital footprint can be a deciding factor for prospective clients.

For example, let's say you exchange business cards with a prospective client at a networking event. If that person has sincere interest in your services, he or she will Google you and your business to learn more. If they find awards, recognition and positive press, it can reinforce or elevate that interest. If they find a lackluster or even negative digital presence, their reception to your follow-up might not be so warm.

Here are proven and popular ways to leverage press, enhance your digital presence and amplify the impact of your PR success.

Creating A Press Page, Banner And Slider On Your Website

Your website is the foundation of your digital presence, so the first step to leveraging third-party credibility should be optimizing your website to highlight your PR success.

Most financial advisory or professional services firms should already have a company blog or announcement page. But if you are investing your time and money into a PR campaign, you should create a separate page on your website dedicated to showcasing your press coverage. Here is a great example:



Additionally, an “*In the News*” banner (example below) is an element to be showcased on your homepage that gives your brand instant credibility to visitors. And an alternative to a static banner could be a slider that showcases earned media logos or even specific press hits you would like to promote.



Sharing Press Coverage Across Social Media

It is common for advisors to share interesting news stories related to their industry across social media. Earning quotes and features in the media, however, allows you to take this practice to the next level by sharing articles and news stories that feature your practice and your insight, rather than someone else's.

The big three – Facebook, Twitter and LinkedIn – have become hugely valuable platforms for leveraging PR success and helping you reach a wider audience. These platforms can help a local advisor funnel national press coverage to their local audience. Similarly, it can help a national advisor team leverage community awards with their national audience.

Sending Media Hits To Your Email Lists

Email marketing is still a popular and effective way for financial advisors to stay connected with customers, prospects and business associates.

Adding press hits to an email newsletter is a great way to leverage your PR success with your key audiences. Additionally, email lists can be a useful tool when promoting scheduled broadcast appearances. For example, if you are scheduled to appear on CNBC, you can send your email list a notification to tune in and watch it live.

Using email marketing and other modern methods of leveraging press are generally inexpensive, yet they can increase the value and impact of positive press exponentially when done right.



7

Traditional Methods For Leveraging Press

a. Ordering Reprints For Your Sales Kit

b. Framing Articles For Your Office

c. Highlighting Press In Mailers And Newsletters

To further maximize the value of earned media, you must understand your prospect pool and which forms of marketing and influence they will best respond to. Advisors who tend to work with the 50+ demographic, in particular, should consider incorporating traditional methods for leveraging third-party credibility in addition to the digital methods previously discussed.

While traditional methods often come with a higher cost, they can add another layer of trust, legitimacy and sophistication to your brand – further distinguishing your practice from the competition.

Ordering Reprints For Your Sales Kit

Although the world is going digital, there is still a sizable chunk of the U.S. population that prefers physical literature over websites and multimedia. Because of that, sales kits are still a popular and effective marketing tool among financial advisory firms.

While your sales kit likely includes service and product descriptions, case studies and company background, adding a reprint of one of your contributed articles or company press features is an impactful way to leverage third-party credibility, providing the prospect with a physical copy of the article.

Many local and national news outlets allow you to order a stack of reprints of a given article. Often you can also order physical reprints of online only articles that are reformatted as if they ran in the paper or magazine. They usually aren't cheap, but if you're looking for a way to make your sales kit stand out from your competitors, the right article could tip the scale. To familiarize yourself with common reprint options, and the costs associated, take a look at offerings from a few major publications:

New York Times

Wall Street Journal

Bloomberg

Time

Framing Articles For Your Office

Any financial advisor who hosts client meetings should consider buying, framing and mounting their top news features in their office.

“Some publications have framed reprints as an option to purchase on their reprints page. For others, you may need to purchase a loose reprint and frame it yourself. If the article is in print and neatly formatted, you can always get out your scissors, cut it out and frame it yourself.”

Highlighting Press In Mailers And Newsletters

Firms that invest in direct mail campaigns and physical newsletters should establish ways to incorporate their PR success in those campaigns.

For newsletters, you can include a screenshot from a TV broadcast appearance and a brief description of the segment. Or include your best quote from a print article you were interviewed for. For direct mailers, consider including an “As Featured In” banner similar to the one described on page 17.

Mail campaigns, as well as many other traditional marketing tactics, are rarely cheap. So make sure you’re integrating your PR placements with those campaigns to maximize the value from the time and effort you put into each.

8 Opening New Sales Pipelines

- a. Setting Goals And Expectations
- b. Committing To A Long-Term Plan
- c. Seeking Expert Guidance

An integrated public relations plan can produce game-changing results for an advisory practice. Some of the often overlooked benefits to consider are:

- Enhancing company culture and morale
- Luring and retaining talent
- Securing future PR placements

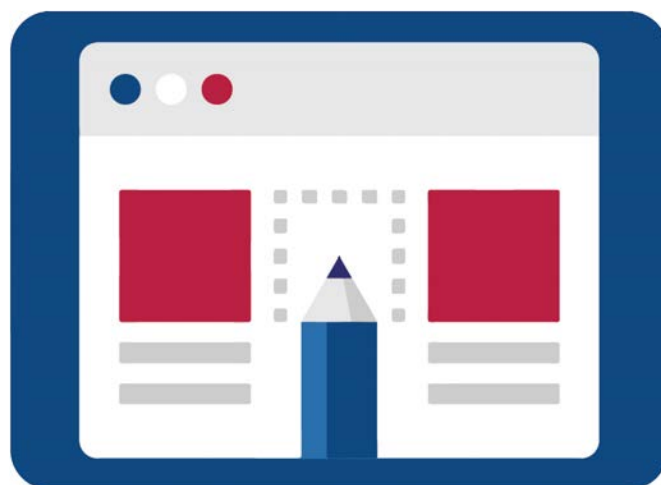
BENEFITS

With that said, the overwhelming majority of financial advisors list increasing revenues as their primary goal. The fact is, when they effectively earn and leverage third-party credibility, they can and will push the sales needle and open the door to new levels of growth. The following tips are recommended for maximizing the effectiveness and profitability of your PR efforts:

Setting Goals And Expectations

It is important for financial advisors to set clear goals before investing an ounce of time or money into a PR campaign.

Some advisors just want to pursue a bucket list strategy – meaning they want placements in a handful of desired outlets over a short-term campaign, usually so they can include them in an “As Featured In” banner on their website or in other marketing materials. So for them, obtaining those media placements is the goal, and it’s how they measure the success of their efforts. Others, however, have more comprehensive goals like increasing monthly website traffic, higher search rankings, lead generation, improved conversion ratios and an overall increase in sales. In those cases, they want earned media to serve as a means to a desired result, rather than the result itself.



For the more comprehensive campaigns, it’s critically important to set clear and realistic expectations. As I mentioned earlier in this e-book, being quoted in the paper will rarely, if ever, directly produce a new client. If that is your expectation, then you are set up for disappointment, and you will be better served exploring other business development options.

However, if you understand the value of earning and leveraging third-party credibility, and you have a clear vision of its role in your greater marketing and sales efforts, then public relations can serve as a catalyst for long-term growth and success.

Committing To A Long-Term Plan

Financial advisors are notorious for cycling through marketing approaches. Sometimes they will give up on an initiative because they feel it did not produce results fast enough, and other times they are forced to end a campaign because they did not budget for an appropriate length necessary for it to be successful. In both situations, the advisor will have likely received limited return for their time and money.

It is important to understand that comprehensive PR campaigns take time to develop and produce tangible business results. It can typically take between 3 to 6 months for a PR campaign to really hit its stride, and because it is so often momentum driven, a campaign that goes through lengthy pause can take another few months to gain that momentum back.

It is also important to understand that building a PR presence is much like building a resume. To land a great job, employers expect to see past experience. To land a big press opportunity, you will usually need to have a history of quality press placements.

Understand that you are not going to land a game-changing media placement or start generating new business from it overnight. But taking a focused, long-term mentality will certainly put you and your company on the right path.

Seeking Expert Guidance

Being a financial advisor, your clients count on you to provide guidance, advice and services for projects and activities outside of their own expertise and capabilities. If you are serious about turning press into profits, consider engaging with an integrated public relations agency to lead the way.

**To learn more about the benefits of public relations for
professional services firms visit:**

www.flackable.com



**To schedule a complimentary consultation, give us a call at
(866) 225-0920 or email info@flackable.com.**

ABOUT THE AUTHORS

Brian Hart



Brian Hart is an award-winning communications consultant and founder of Flackable, a national financial public relations and digital marketing agency. The agency, which he bootstrapped in 2014 at the age of 27, represents a national client base of financial and professional services firms. In 2015 he was recognized by Adweek and his peers as one of the [PR Industry 30 Under 30](#), and in 2016 he was honored as one of the [Lehigh Valley Business Forty Under 40](#).

As founder and president of Flackable, Brian is committed to helping clients reach a new level of growth by emboldening them with superior communications counsel and services. His team's efforts bolster brand engagement and routinely land clients in top news outlets including The Wall Street Journal, CNBC, Fox Business, Bloomberg, Forbes, Barron's, US News & World Report, The Associated Press, Reuters and various industry trade press.

Brian is a Temple University graduate with a B.A. in strategic communication and a political science minor. He began his career as a licensed life and health insurance professional at a broad-based financial services firm in King of Prussia, PA. Prior to founding Flackable, Brian represented a number of leading financial services firms at a public relations agency in New York City and New Jersey.

Connect with Brian:



ABOUT THE AUTHORS

Mark Mersman



Mark Mersman is the chief marketing officer at USA Financial. He joined the firm in 2004 and has had numerous roles within the company before his current position. He entered the world of finance by launching his own firm at the age of 22, a planning firm committed to helping educators further understand their pensions and retirement planning and investment options.

Mark is one of the co-hosts of the nationally syndicated [USA Financial Radio Show](#). In addition to helping clients and advisors to plan first and invest second, he is responsible for the creation and development of the firm's marketing initiatives. He has written numerous educational seminars on a wide-ranging list of financial topics, and

serves as a business-building consultant to financial advisors across the country.

Mark has been published in numerous industry publications, including The Wall Street Journal, Barron's, and Financial Advisor magazine, in addition to being featured as a guest blogger for the National Christian Foundation. He also served on an advisory board to one of the largest insurance companies in the world.

Mark graduated from Michigan State University, and is a die-hard sports fan. When he's not in the office, Mark stays active playing basketball, softball, and golf. He and his family enjoy spending time on the lake and being outdoors with their two dogs.

Connect with Mark:



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