

Transform your Business with Niche Marketing



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CURTIS FINANCIAL PLANNING

What You'll Learn

- Importance of Niche Marketing
- How to Develop Niche Personas
- How To Get Active on Social Media
- Website Branding
- Blogging Tips
- Networking In Your Niche Waterholes



PART ONE

Niche Personas



Why Niche?



What is Niching?



How I Chose My Niche

First, think about who you like to work with and **why**. Most often, you'll have a lot in common with your ideal client from personal or past experiences.



Personal
Connection

Values

Comm.
Style

Concerns or
Problems

Interest and
Hobbies

Why I Chose Women As My Niche

- ✓ Easy to talk to and open
- ✓ Not ego-driven
- ✓ Admit when they need help
- ✓ Saw a need that wasn't filled by advisors
- ✓ Big opportunity - control a majority of the wealth in U.S.
- ✓ Live longer than men
- ✓ Comfortable with paying for services



3 Types of Client Personas



Mid-Career Professional Profile



Mid-Career Professional Pain Points



- Frustration and boredom with corporate life
- No time to enjoy hobbies
- Not enough leisure or travel time
- Worried about retirement savings – is it enough?
- Aging
- Being relevant



Retired, Widowed or Divorced Woman



Retired, Widowed or Divorced Woman Pain Points



- Running out of money
- Deteriorating health and healthcare costs
- Leaving something to children and grandchildren
- Being alone



Young Professional or Self-Employed Woman



Young Professional or Self-Employed Woman Pain Points



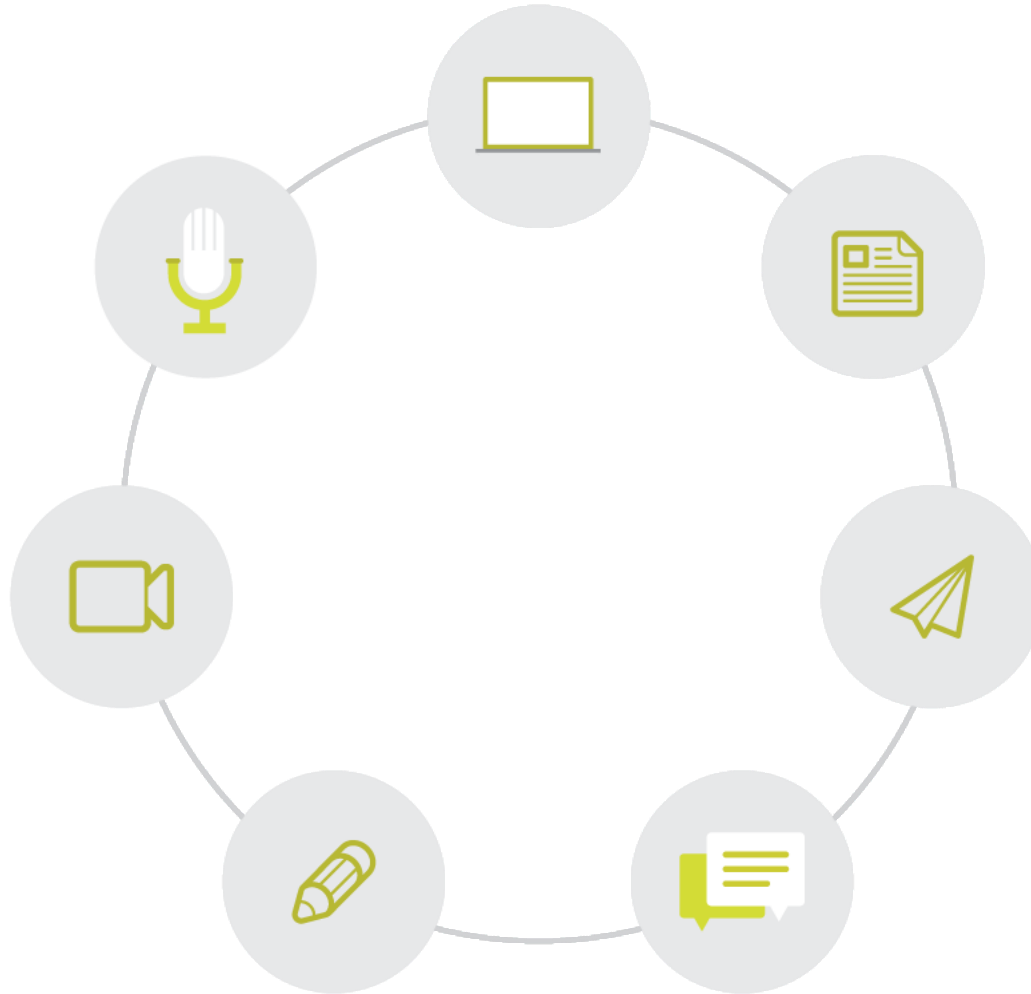
- Debt
- Lack of financial education
- Cost of living
- Managing cash flow



PART TWO

BRANDING YOURSELF: SOCIAL MEDIA

Importance of Internet Marketing



Top 5 Rules of Social Media Marketing

1. Choose social platforms that best reflect your style and serve your niche
2. Be present and consistent
3. Don't get discouraged if you don't get clients right away
4. Don't sell on social media
5. Content is king



Choose Social Platforms that Best Reflect Your Style and Serve Your Niche



Facebook Personal

Best Place to be Real and Stay Connected



- ✓ It's okay to be passive on Facebook
- ✓ Be yourself, don't edit what you post too much



Twitter

Not for the shy/Great way to build community



- ✓ Mix up tweets with personal and business
- ✓ Be interactive
- ✓ Follow people
- ✓ Use Twitter lists and other tools to better monitor and engage



YouTube

Create Trust Visually



- ✓ Video is a very useful tool for advisors
- ✓ Try doing 1-minute video blogs



LinkedIn

A professional rolodex on-line



- ✓ Have to be there
- ✓ Join groups
- ✓ Prospecting opportunities



Facebook Business Pages

Have to have one!



- ✓ Facebook business pages aren't the best way to directly interact with prospects or meet prospects



Pinterest

For the visually inclined



- ✓ Great way for people to see what you're interested in
- ✓ Pinterest personal profile
- ✓ Pinterest business profile



Instagram

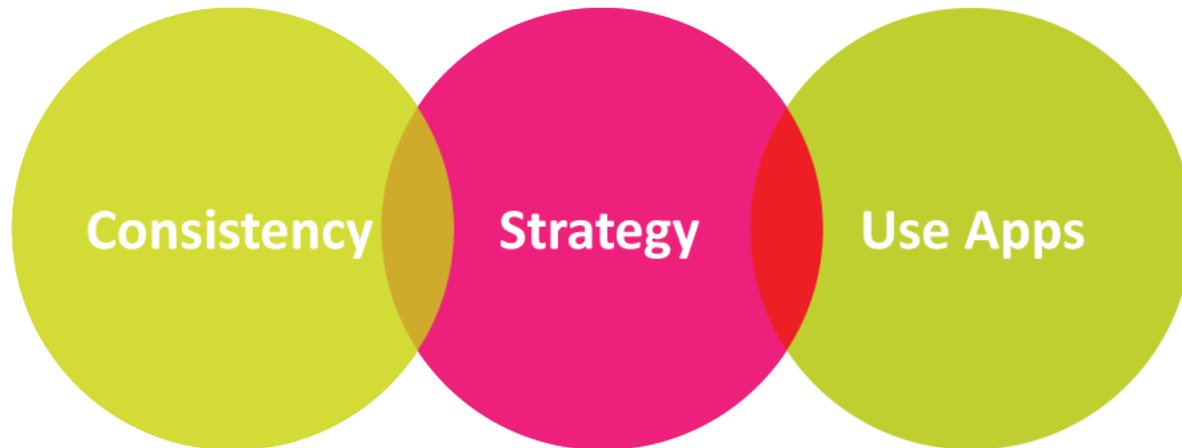
Not great for financial services



- ✓ Not a great place to promote a financial services business
- ✓ Good for clothing or home décor stores, artists, jewelry designers, etc.



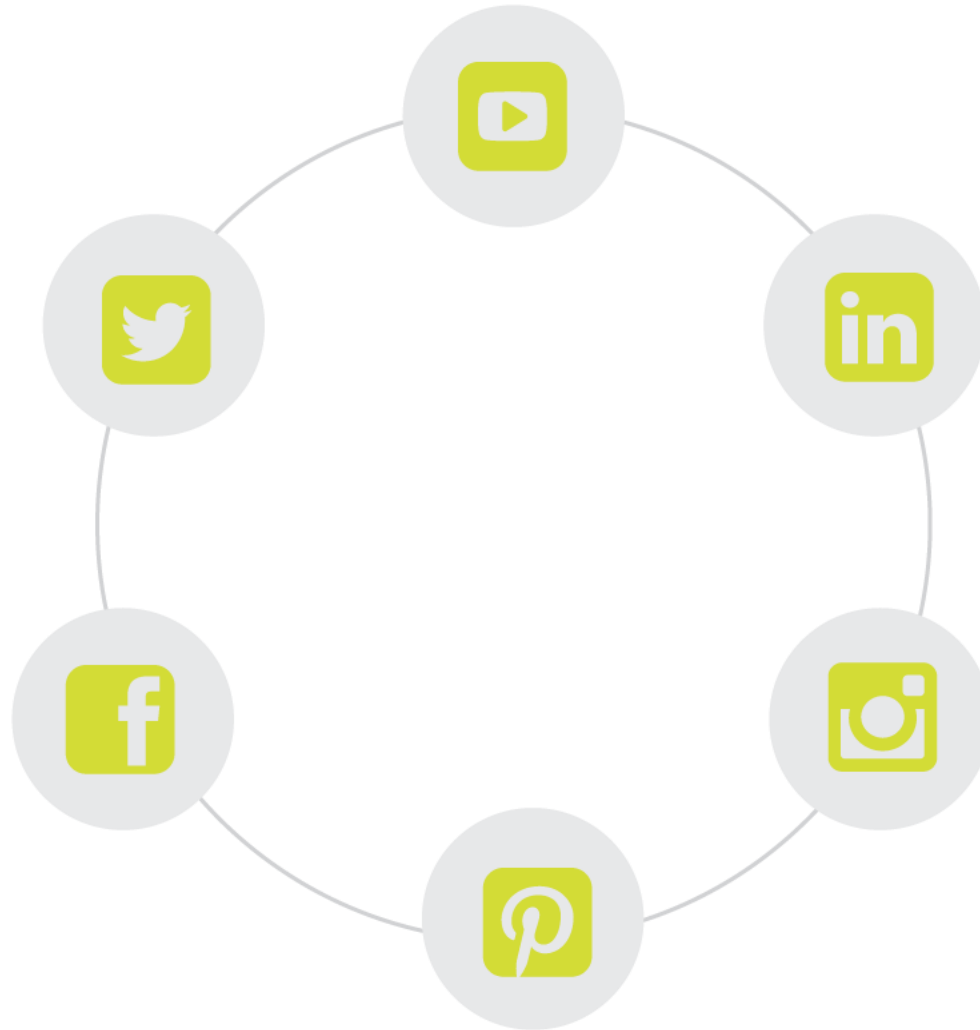
Be Present and Be Consistent



Don't Get Discouraged if You Don't Get Clients from Social Media Right Away



Don't Sell on Social Media



Content is King



Content



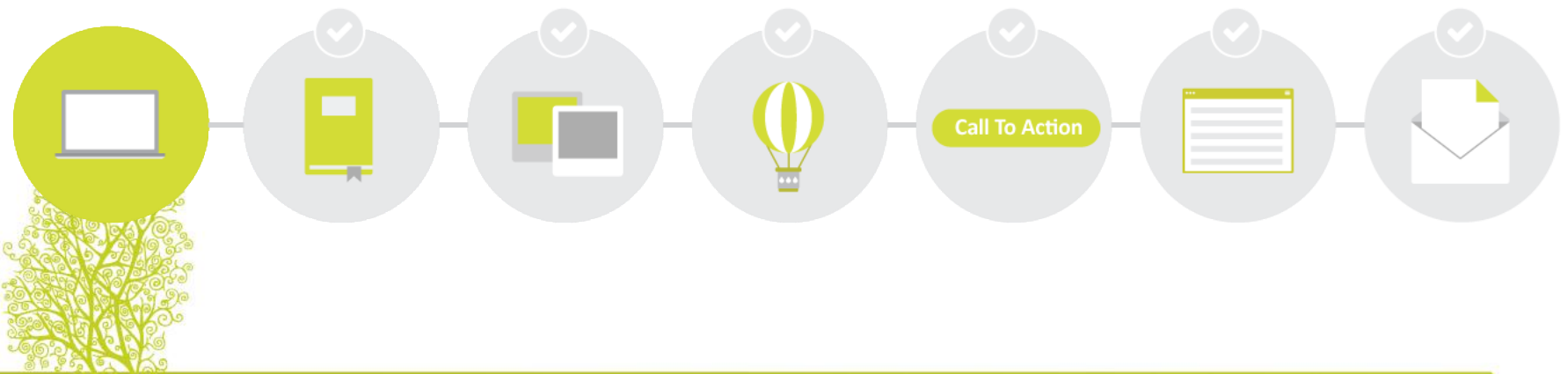
PART THREE

BRANDING YOURSELF

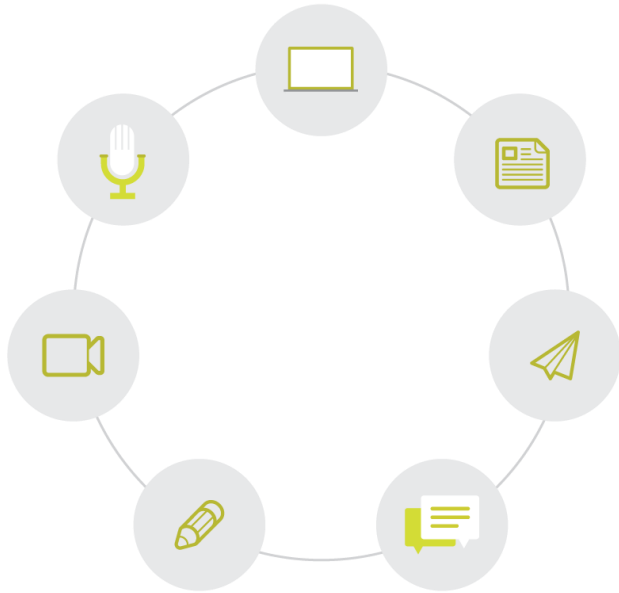
WEBSITE AND CONTENT MARKETING

Website Must-Dos

We all go to websites now when we are looking for a product or service. Think about how valuable that on-line real estate is to your business? It's much easier to build a compelling website and blog when you know exactly who you're talking to.



Content Marketing



- ✓ Blogs
- ✓ eBooks
- ✓ Videos
- ✓ Newsletters
- ✓ Podcasts



Content Marketing Strategies

- ✓ Reach out for guest blogging opportunities
- ✓ Request COIs to write an article for your blog
- ✓ Provide educational resources (white papers, eBooks)
- ✓ Create downloadable tools (checklists, spreadsheets)
- ✓ Discuss topics of interest, commonly asked questions or topics relating to their pain points
- ✓ Post your newsletter to your website and social media to share
- ✓ Post commentary about the market
- ✓ Client case studies highlighting your process, values and philosophy



PART FOUR

Branding Yourself: Blogging

Blogging





PART FIVE

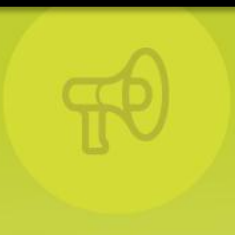
Branding Yourself: Networking

Is Networking Still Valuable?





Recap. Questions?



Thank you!

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