

How to Build a Compelling Brand Virtually

January 20, 2021

AGENDA

- Introduction
- What to Expect
- Important Terms
- Digital Marketing Landscape
- Brand Consistency
- Branding & Marketing Audit
- Message & Content Plan
- Virtual Networking Tips
- Determining Your Budget
- Wrap-Up
- Q&A

INTRODUCTION



beth@yeahwhatshesaid.net
804-894-2155
www.yeahwhatshesaid.net

- 25+ years in Financial Services
- 15+ years specifically in Financial Services Marketing & Sales
- Will help define your brand, differentiate your product, build credibility & compel clients to take action
- Creative, efficient, fun



info@jolinda.com
804-362-7660
www.jolinda.com
313 E Broad Street, Ofc 342
Richmond, VA 23219

- 20+ years in graphic and web design
- Wirehouse & RIA experience
- Will create a visual brand and professional website that reaches your ideal client & that you know how to leverage
- Creative, patient, collaborative



WHAT TO EXPECT

- Most effective digital marketing platforms
- How to create a 1st class online presence
- Tools to audit your current branding & marketing
- Content calendar & planning templates
- Steps for intentional virtual networking
- How to determine an appropriate branding & marketing budget

IMPORTANT TERMS

- Brand
Total perception of you/your business
- Marketing
The story you tell through your outlets
- Advertising
Pay others to tell stories on their outlets
- Public Relations
Stories told on your behalf in public
- Outlets
All the places your brand, marketing, advertising can show up

A BRAND THAT RESONATES

Tell us in the chat

- Is there a brand that you are very loyal to right now?
- What keeps you engaged?



Beth's favorite

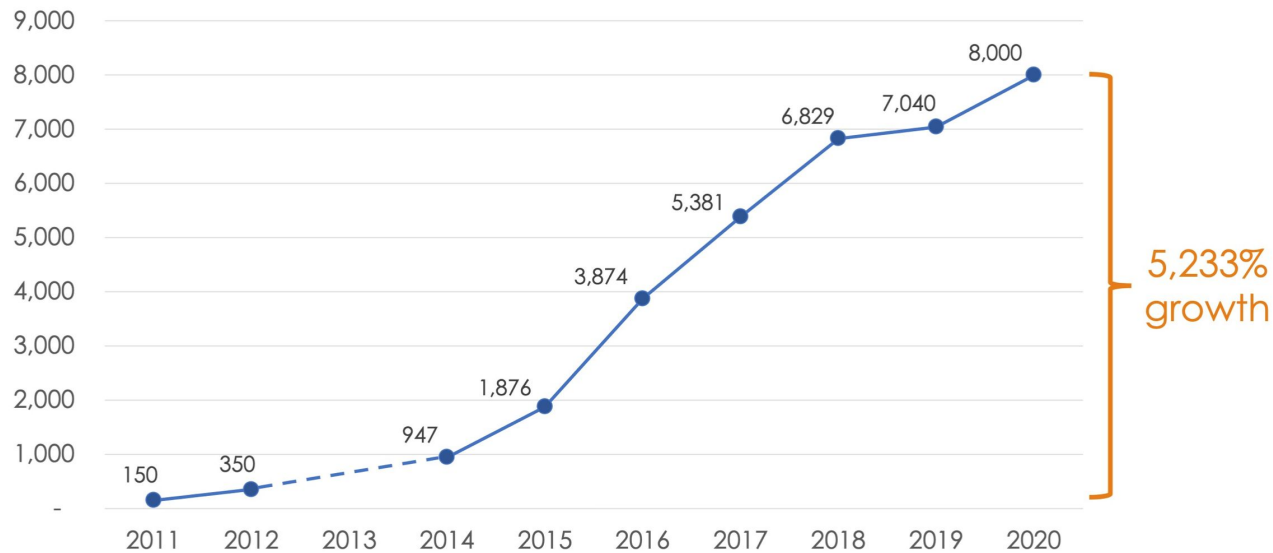


Jolinda's favorite

android

DIGITAL MARKETING LANDSCAPE

Growth of the Martech Landscape 2011-2020



Total Solutions	8,000	Growth Since 2019	Biggest Subcategory Growth (Percentage) Since 2019
Advertising & Promotion	922	4.1% ↑	Print 35% ↑
Content & Experience	1,936	5.6% ↑	Video Marketing 26% ↑
Social & Relationships	1,969	13.7% ↑	Conversational Marketing & Chat 70% ↑
Commerce & Sales	1,314	9.0% ↑	Retail Proximity & IOT 15% ↑
Data	1,258	25.5% ↑	Governance, Compliance & Privacy 68% ↑
Management	601	15.2% ↑	Projects & Workflow 41% ↑



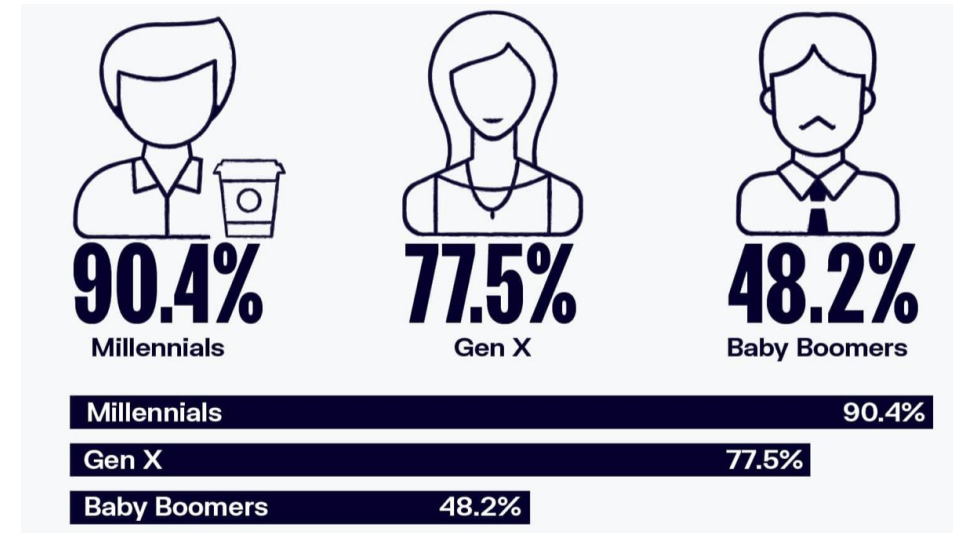
LET'S CUT THROUGH THE NOISE

Data: Website

- 83% users expect site to load in 3 seconds
- 94% of negative website feedback is design based
- Users spend an average of 5.59 seconds looking at text
- Users spend 88% more time on pages with videos
- Education > Sales

Conversational: Social Media

- 3.5 billion people use Social Media
- 68% US adults use Facebook
- 3-hour average social media daily usage



BRAND CONSISTENCY

- Consistency = Legitimacy
- Each digital “touch” builds Know, Like, Trust
- Human brain processes images 60,000 times faster than text
- Color improves brand recognition by up to 80% (Forbes)
- 92.6% of people base purchasing decisions on visuals



BRAND CONSISTENCY

Why is this important?

- Up to 23% increase in revenue with consistent branding (Forbes)
- Consistency = Comfort

We can all use more of that these days!

BRAND CONSISTENCY

Signs of a consistent brand

- Visually matching across outlets
- Consistent language
- Photos of people are recent (clothings styles, age, weight)



MY FAVORITE TOOLS

- [Lav mic](#)
- [Desktop lighting](#)
- [Phone tripod](#)
- [Lighting kit](#)



BRANDING/MARKETING AUDIT

- Who's your target audience?
- What problems are you solving for them?
- What do you want them to know?
 - Target Audience Worksheet
 - Keyword Exercise
- Analyze current website content
 - Google Search Console
 - Screaming Frog
 - SEMRush
- Social media, print, email
- Keep/Refresh/Remove

MESSAGE & CONTENT PLAN

- What do you want your brand to be known for in 2021? Beyond?
- What important themes or topics will you focus on in 2021?
- How can you build on what worked in previous years?
- Content Calendar
- Work smarter, not harder!
 - Hootsuite
 - Constant Contact

VIRTUAL NETWORKING TIPS

- Since we can't casually bump into people at a coffee shop, at the club or a favorite neighborhood hangout - we have to create intentional networking time
- There isn't a clear "end", so keep planting seeds this way
- Find moral support and see new people outside of your home / office group



VIRTUAL NETWORKING TIPS

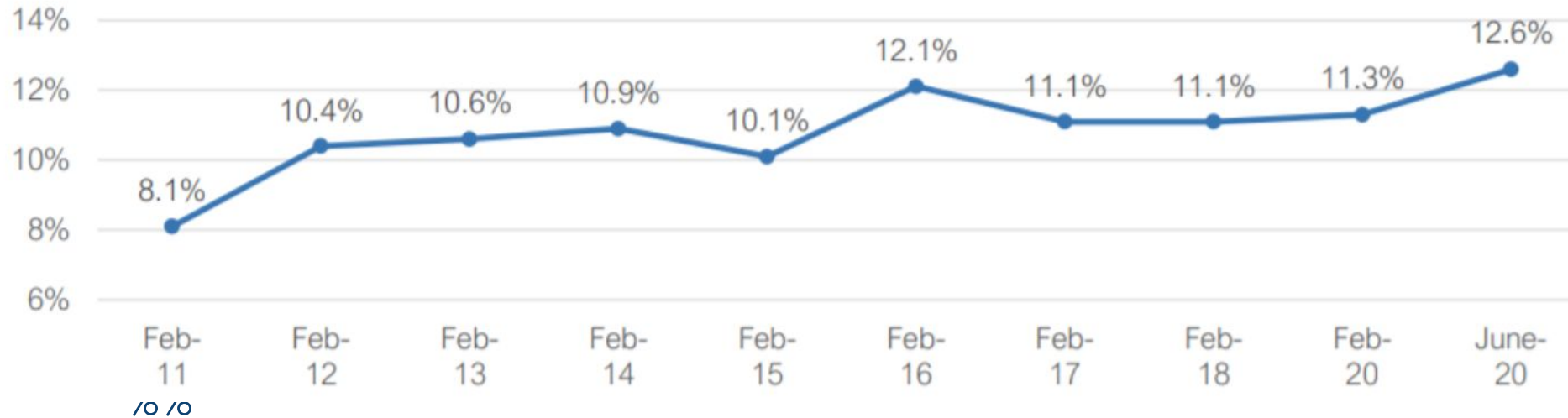
- Our whole society has been forced to become more tech savvy - leverage that!
- Find a group that resonates / or create your own
- Go deep vs. casting a wide net with shallow interactions
- Consider how you show up to these! A first impression digitally is still a first impression
- For existing clients:
 - host a digital networking event?
 - virtual coffee with a financial professional?
 - client breakfast virtually - many of your clients may be craving social interaction

VIRTUAL NETWORKING TIPS

- Leverage conversation starters
 - What are you most excited about right now?
 - If you were to give a TED talk, what would it be?
 - If you were to learn any new skill, what would it be?
 - What's one book everyone should read, and why?
- Test!
 - Check your lighting, camera and sound
 - Practice with a coworker to know what others will see
 - Charge your phone / laptop

DETERMINING A BUDGET

Marketing budgets as a % of firm budgets rose during the pandemic



Source: CMO Survey

- 2019 industry average for Banking/Finance/Insurance = 9.2%
- 3rd Party Digital Marketing Calculators
 - 1) [WebStrategies](#)
 - 2) [Insivia](#)
 - 3) [JEMSU](#)

WRAP-UP

Tell us in the chat

- What piece of information resonated for you?
- Is there a single action that you can take that would elevate your virtual brand?

Consistency is key

- What are you considering that would be simple, fun and easy for you to do consistently?
- Is there an accountability buddy in the room now or in your office that you can work with?

Leverage our tools!

Q&A



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313 E Broad Street, Ofc 342
Richmond, VA 23219

CFP Approval Code: XXX



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