YARDSTICK

WORKBOOK

IMPRESSING PROSPECTIVE CLIENTS ON THEIR DIGITAL JOURNEY TO YOUR DOOR IN 7 SIMPLE STEPS

US EDITION

10 QUICK-FIRE FACTS ABOUT YARDSTICK

#1. We have a team of 55 people

#2. Our website designs are award-winning

#3. We have over 270 5-star Google reviews

#4. We're a financial services specialist marketing agency

#5. We can work strategically with you, or on one-off projects

#6. Our founder, Phil Bray, used to work as a financial adviser

#7. We have a 96% "recommend to a friend" rating on Glassdoor

#8. We run free monthly webinars to help you improve your marketing

#9. Our website is packed with free information and resources to make your marketing easier

#10. We won the FT Adviser Best business marketing and promotion service to advisers award in 2024 and 2025.

If you'd like to learn more about how we can improve your marketing, please get in touch, and we'll arrange a chat with our team.

0115 8965 300

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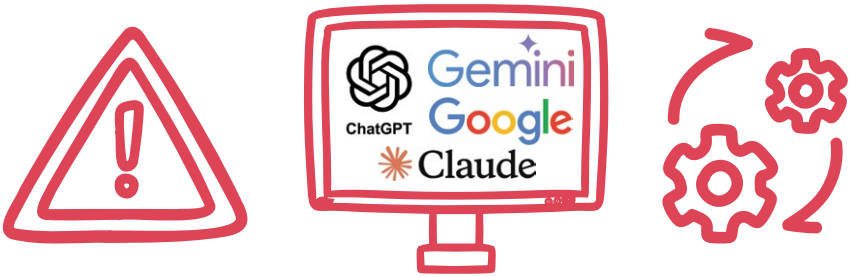
VISIT OUR WEBSITE

THE PROBLEM: POTENTIAL CLIENTS CONSIDERING MULTIPLE ADVISER/ PLANNER OPTIONS



AWARENESS → RESEARCH → ACTION

THE SOLUTION: IMPRESSING PROSPECTS ON THEIR DIGITAL JOURNEY TO YOUR DOOR

80% of a consumer's buying decision is made before they meet you.

That means you and your business need to be:

☑ VISIBLE ONLINE ☑ IMPRESSIVE ONLINE.

On the following pages, you'll learn the seven steps you need to take to do both.

If you successfully complete each step, more people who become aware of you, including those referred by existing clients, will take action to contact you.

STEP #1: PROVING ONLINE VISIBILITY

THE THEORY

When someone searches for you or your business online, they need to easily find your website and other information about you.

THE IDEAL WORLD

Your website appears at the top of the results page when someone searches for your business on Google.

YOU AND YOUR BUSINESS

Action: Go to Google, open a private or incognito browsing window, and type in your business name and any alternatives people might search for. Review the results to see whether your website appears at the top of the page and whether your Google Business Profile is also visible.

NOTES:

STEP #2: CHECKING WHAT PROSPECTS SEE

THE THEORY

You can't control what people click when they search for your business, but you can control what they see.

THE IDEAL WORLD

Every link on the search results page includes accurate, up-to-date information about your business.

YOU AND YOUR BUSINESS

Action: Click every link that relates to your business on the first five pages of the search results and check that the information displayed is complete and up to date. If it isn't, take steps to change it.

NOTES:

STEP #3: BUILDING AN IMPRESSIVE GOOGLE BUSINESS PROFILE

THE THEORY

Your Google Business Profile contains important information about your business and is a great opportunity to impress a potential client at an early stage.

THE IDEAL WORLD

Your profile should be fully completed, including photos of your team and office, opening hours, contact details, and a description explaining what you do, who you do it for, and why people use you.

YOU AND YOUR BUSINESS

Action: If your business already has a Google Business Profile, make sure it's fully completed. If you don't have a profile, claim yours and complete it.

DOWNLOAD OUR DEFINITIVE GUIDE TO BUILDING A GOOGLE BUSINESS PROFILE

STEP #4: IMPRESSING PROSPECTS WITH YOUR GOOGLE REVIEWS

THE THEORY

Google reviews impress potential clients when they search for your business online, can be used elsewhere in your marketing, and help boost your Search Engine Optimisation (SEO).

THE IDEAL WORLD

Your business has an impressive number of reviews, some of which are recent, and all have been replied to.

YOU AND YOUR BUSINESS

Action: Check with your compliance department, team or support that you are allowed to collect Google reviews and any specific rules you need to comply with. Then, look at how many Google reviews you already have and whether each one has a reply. Consider running a booster project to ask all clients for reviews at the same time. Then, update your processes so new clients are asked after being onboarded and existing clients after annual reviews.

DOWNLOAD OUR DEFINITIVE GUIDE TO COLLECTING ONLINE REVIEWS

STEP #5: IMPRESSING PROSPECTS WITH YOUR REVIEWS ON A SECOND PLATFORM

THE THEORY

Google reviews are hard to get and don't appear when a potential client searches for a specific adviser or planner. Therefore, reviews should also be collected on a second platform. We recommend Wealthtender.

THE IDEAL WORLD

Every adviser/planner in your business has a Wealthtender profile with an impressive number of reviews, which are regularly added to, and all have replies.

YOU AND YOUR BUSINESS

Action: Build Wealthtender profiles for the advisers/planners who don't have them. Then, run a booster project for all advisers/planners and change your processes so new clients are asked after being onboarded and existing clients after annual reviews.

NOTES:

STEP #6: IMPRESSING PROSPECTS IF THEY VISIT YOUR LINKEDIN PROFILES

THE THEORY

When a potential client searches for your business, links to your company's LinkedIn page and your personal LinkedIn profile may be shown. The information on these pages must impress them if they visit.

THE IDEAL WORLD

Your company's LinkedIn page and personal profiles belonging to your advisers/planners are fully completed, explaining what you do, who you do it for, and why people use you.

YOU AND YOUR BUSINESS

Action: Search for your business and your advisers/planners on Google. Then click the links to LinkedIn and review what you see, considering ways the profiles could be made more impressive.

DOWNLOAD OUR DEFINITIVE GUIDE TO USING LINKEDIN EFFECTIVELY

STEP #7: TURNING YOUR WEBSITE INTO AN IMPRESSIVE SHOP WINDOW

THE THEORY

Your website is your online shop window and where most people will head after searching for your business to understand if you are the right option for them.

THE IDEAL WORLD

Your website needs to explain who you work with, show the value of working with you, and introduce your team.

YOU AND YOUR BUSINESS

Action: Use our scorecard to check whether your website is a truly effective shop window that'll push prospects into taking action.

SCAN THE QR CODE TO DISCOVER HOW YOUR WEBSITE SCORES

NOTES:

8 STATS THAT'LL HELP YOU MAKE BETTER MARKETING DECISIONS

ONLY 3-5% OF YOUR AUDIENCE IS READY TO ENGAGE RIGHT NOW

Most prospects won't be ready for weeks, months, or years, so focus on consistent nurturing to stay front of mind until they're ready to engage.

AI-DRIVEN TRAFFIC TO ADVISER/ PLANNER WEBSITES HAS INCREASED BY 118% IN THE LAST SIX MONTHS

AI is changing how consumers find financial advisers/ planners. You need to supply AI with clear source information and expertise indicators to encourage it to recommend you.

89% OF CONSUMERS USE ONLINE REVIEWS WHEN RESEARCHING A PRODUCT OR SERVICE

Online reviews reassure prospects that people like them have trusted you and been glad they did. If you don't have reviews, you're asking prospects to take a leap of faith.

64% OF CONSUMERS ARE MORE LIKELY TO PURCHASE AFTER WATCHING A VIDEO TESTIMONIAL

An existing client explaining how you've changed their life in their own words is very powerful. That means client video testimonials are the gold standard of social proof.

#5

58% OF CONSUMERS FIRST DISCOVER NEW BUSINESSES ON SOCIAL MEDIA

Potential clients need multiple touchpoints before they're ready to engage. Show up consistently on social media to build trust through repeat exposure.

#6

EMAIL MARKETING DELIVERS AN AVERAGE $36-43 ROI FOR EVERY $1 SPENT

Email newsletters are a cost-effective way to nurture prospects. Sent regularly, they build familiarity and add value, so you're the obvious choice when a prospect is ready.

#7

BUSINESSES WITH A MARKETING STRATEGY ARE 313% MORE LIKELY TO BE SUCCESSFUL

Marketing works best with intention. A clear strategy keeps you focused on the right audience, priorities, and measures of success, instead of chasing shiny tactics.

#8

80% OF A PROSPECT'S BUYING DECISION IS MADE BEFORE THEY MEET YOU

Competition rarely happens at the first meeting. Instead, it's invisible and takes place much earlier in a prospect's journey to your door.

YOUR 7-STEP CHECKLIST

STEPS	TO DO	DONE
STEP #1: PROVING ONLINE VISIBILITY	☐	☐
STEP #2: CHECKING WHAT PROSPECTS SEE	☐	☐
STEP #3: BUILDING AN IMPRESSIVE GOOGLE BUSINESS PROFILE	☐	☐
STEP #4: IMPRESSING PROSPECTS WITH YOUR GOOGLE REVIEWS	☐	☐
STEP #5: IMPRESSING PROSPECTS WITH YOUR WEALTHTENDER REVIEWS	☐	☐
STEP #6: IMPRESSING PROSPECTS IF THEY VISIT YOUR LINKEDIN PAGE/ PROFILES	☐	☐
STEP #7: TURNING YOUR WEBSITE INTO AN IMPRESSIVE SHOP WINDOW	☐	☐

Delivering marketing excellence to the financial services profession.

We'll be your marketing department or support your in-house team.

If you'd like to learn more about how we can improve your marketing, please get in touch, and we'll arrange a chat with our team.

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