

# *Social Media Bootcamp for Advisers*

## *August 2019*





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## 1.0 Introduction

Social media is everywhere and cannot be ignored. Advisory businesses can combat social media through effective communication of not only their proposition, but of one of the key elements of that proposition - their experience. The way consumers now recommend and refer is changing. Yes, word of mouth is still prominent, but social media is fast becoming the preferred way to recommend or condemn products and services. How many 'likes' does your business have?

The use of social media among UK advisers is now growing rapidly and those that engage view social media as an increasingly important tool to:

- ✓ Connect with clients
- ✓ Grow their business
- ✓ Better understand their clients' investment goals

Any business that ignores the power of social media will struggle to survive in the long run as they fail to take advantage of the opportunities this communications revolution can offer.

If referrals are important to you and you've no social media presence, you could be in danger of missing out. Referrals of the future and recommendations, positive and negative, will be done online using social media. Every business needs to consider how they'll be involved in this dialogue and how they'll harness it to maximum effect.

Social media can also be the medium you adopt to highlight your service proposition, your experience and the help you can, and have, provided clients. If done as part of a referral process, it can be the perfect platform for your clients to refer you to their friends' family and other followers.

Hopefully this adviser guide will help with some way toward understanding the benefits of social media and more importantly, how to use it successfully.





## 2.0 Why social media is here to stay for Advisers and their clients

### 2.1 How are UK consumers using social media?

Social media is not the first mass media. Radio and then Television revolutionised the way we communicate but social media is perhaps the most societally transformative technology to sweep the globe. It undoubtedly connects us in a way never before experienced and which will possibly never be repeated. As the stats highlight, social media is here to stay.

There are now 3.484 billion active social media users around the world. This number represents 45% of the world's population and an increase of 280 million since 2018. This growth rate is projected to grow even higher as the developing world embraces social media platforms.

In the UK specifically, there are now 45 million social media users which equates to 67% of the entire population.

Of these, 39 million are mobile social media users. So anyone not optimising their campaigns for mobile will not be having the desired effect.

96% of UK social media users visited a social network or messaging service in the past month. Of these 77% actively engaged or contributed to social media in this time.

Every day, the average UK based user spends 1 hour 50 minutes scrolling through social media sites. This may not seem that much if you work in social media, but consider this figure spans across all ages and locations across the country.

Interestingly, only 13% of UK Internet users use social media for work purposes. In 2019, as more employee advocacy programmes launch, engaging staff members to utilise social media it is expected that this figure will significantly increase.



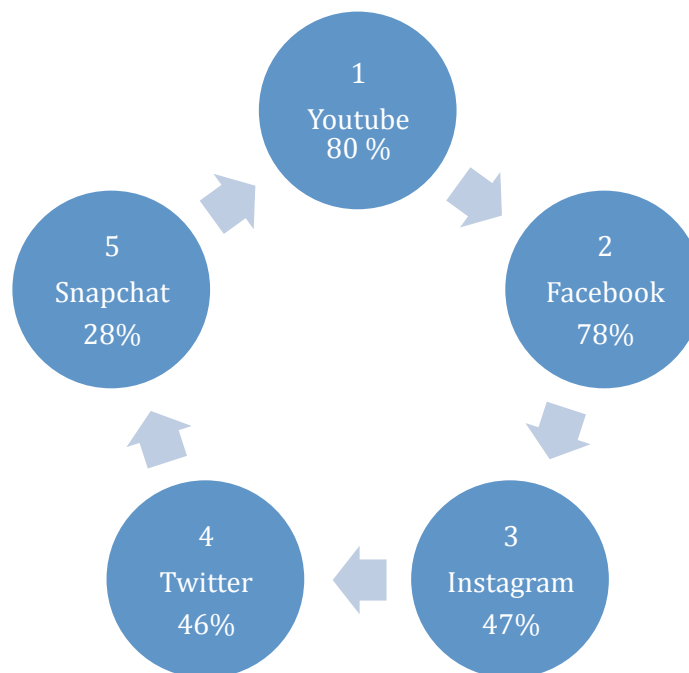
The UK market Internet is edging closer towards total saturation - Internet penetration in the UK currently stands at 95%.

Overall, the participation of social media in the UK market saw a rise of 1% over the last year, moving from 66% of the total population (all ages) in 2018 to 67% by January 2019.

Social media is now an ingrained part of everyday life in the UK and the UK is very much a mobile-first nation.

*Source: Hootsuite*

According to the annual Hootsuite social media trends survey on average, each of the 45 million social media users in the UK now has 7.1 social media accounts. The top accounts used are:



*Source: Hootsuite January 2019*



## 2.2 How are UK Advisers using social media?

According to the most recent survey of social media usage of Advisers by Intelliflo's Intelligent Office, 70% of Advisers are using social media as their main marketing tool, with twice as many using it compared to traditional routes, such as sponsorship, email and client events. Seven out of 10 (70%) in the 2018 survey engage in social media activity for business purposes, up from 58% in 2014 when Intelliflo's annual survey began.

In a new question about the other marketing tools used by advisers, 'events where clients and prospects are invited' was top, with just over a third (36%) using this route. Sponsorship was second (31%) and email was third (30%).

The other key findings in the survey were:

- ✓ LinkedIn remains the most popular social platform for business, with 57% actively using it, down slightly from 59% in 2017
- ✓ Facebook has lost popularity, with 37% using this for business
- ✓ Twitter usage is also slightly down: 40% are using it in 2018 compared to 43% in 2017
- ✓ Other social media platforms are slightly up at 7% compared to 6% in previous years, with Instagram being mentioned by 3% of the sample – more than any platform in the 'other' category.

*Source: Intelliflo's 2018 social media survey*



### 3.0 Why are Advisers engaged in social media?

Advisers who are not engaging with clients and prospects via social media could be missing out on developing closer ties, as well as new business opportunities.

So why are advisers active in social media? Again it's best to go back to the latest stats. When asked why their company gets involved in social media the top answer at 56% was 'to be seen to be keeping up with modern communications systems'. The previous year's top answer 'to attract new clients' was in second place.

The Intelliflo social media survey reports other reasons in order of rank which include:

- ✓ To keep up to date with financial news and events - 43 per cent, down from 44 per cent in 2017
- ✓ To communicate with existing clients - 41 per cent, down from 46 per cent in 2017.
- ✓ To help with search engine optimisation - 39 per cent compared to 43 per cent in 2017
- ✓ To see what competitors are doing - 16 per cent, up from 12 per cent in 2017.
- ✓ Not sure, seems like we should be doing something - 9 per cent said, compared to 10 per cent in 2017
- ✓ No idea - 4 per cent, compared to 2 per cent in 2017.

*Source: Intelliflo's 2018 social media survey*

Social media is growing in importance in terms of an effective and efficient communication channel. For example, the fastest growing cohort of Facebook users in the UK are aged 55 plus and there are now 6.4 million people of this age in the UK who regularly use Facebook. Considering the wealth that they control surely they are an attractive market for any advisory business?



Social media is valuable for businesses of any size or industry, and finding customers on social media has a direct impact on sales and your bottom line. Take a look at how much more likely individuals are to buy from the companies that they follow on social media channels. Social media make sound business sense for any Adviser.

## Likelihood of Buying from a Brand People Follow on Social Media

Q2 2016



sproutsocial

[sproutsocial.com/index](http://sproutsocial.com/index)





## 4.0 Addressing your social media fears

Consumer research has highlighted that 81% of shoppers conduct an online research before they make a purchase. 60% begin by using a search engine to find the products or service they want, and 61% will read product reviews before making any purchase or engaging any professional service. So this leads us to ask:

1. How do you feel about social media?
2. How strong is your online presence?

Is your online activity just limited to your website or do you utilise social media marketing using platforms such as Twitter, LinkedIn or Facebook? It's never been more important for an advisory business to understand and utilise social media marketing effectively. This is because the key sources for financial information and advice in the UK are shifting towards an online and social media environment. With the top 3 being:

- ✓ 26% Consumer Websites
- ✓ 21% Financial Adviser
- ✓ 14% Bank or Building society

Also, 81% of small businesses in the UK are using social media marketing.

A social media survey by LifeQuote, has found that 60% of advisers are using social media in a professional capacity. Figures revealed that:

- ✓ 72% use LinkedIn
- ✓ 38% use Twitter
- ✓ 42% use Facebook
- ✓ 8% YouTube
- ✓ 8% Instagram

LifeQuote also found, that of the 60% of advisers that use social media professionally, most are using it for networking but:



- ✓ 42% also use it to keep abreast of business trends
- ✓ 41% as a source of information
- ✓ 41% proactively positioning themselves as a thought leader
- ✓ 28% for client communication
- ✓ 24% to monitor the competition

However, while it's great to see an upward trend in social media adoption, we have to question why 40% are not using social media and why is the advice sector lagging behind other business sectors?

Here are some key reasons why firms are discouraged from using social media:

### **It's complicated**

Some business owners have convinced themselves that social media platforms are foreign, alien things that you can only understand if you're a teenager or a millennial. They haven't taken a moment to learn how Facebook timelines work, or why Twitter is used for different types of interactions than LinkedIn.

### **Overwhelming choice available**

Facebook, LinkedIn, Twitter, Instagram, Pinterest, Snapchat and Tumblr are just a handful of the most popular social media apps available. That number grows bigger every day, and to make things worse, there are multiple ways for businesses to use every platform. Don't worry you don't need to be using every platform. A plan is essential as is careful selection of the mediums which are best for your business and those that allow you to reach the people you want to communicate with.

### **You have to hire someone to do it**

You don't have to hire someone to run your social media marketing. For most small to medium sized businesses, social media responsibilities can be absorbed by your existing marketing team, or even split up and divided amongst your core team.



## **It's not relevant**

Social media is what you make of it. The greater thought you put into a plan beforehand the more powerful its impact on your business. Social media is no magic wand, it's another tool in your marketing plan and can complement your existing activity. In its simplest form it can be the ideal way to drive the people you want to your website. The challenge is obviously having a website that is powerful enough to convert visitors into customers and retain the clients you have.

## **You just don't want to change**

If you have built a successful business without social media then you might not want to change. It could be argued that it's an evolution rather than a drastic change, as you can still keep doing what you have done in the past and then use social media to compliment and aid your existing activity.

## **The value isn't clear**

The Return on investment (ROI) on social media can sometimes be difficult to calculate. However, if you start with a simple plan and stick to it then you can decide the metrics you wish to employ and monitor your progress. I'd start with a very simple one, how many visitors does your social media drive towards your website?

## **It's just a fad**

Social media is here to stay. Most people, especially millennials, are on their phones constantly; whether they're checking their email, posting a selfie to Instagram or tweeting about a trending hashtag, most of them have fully integrated social media into our daily lives. In today's interconnected world, marketing yourself online through social media is a critical tool for any business.



## 5.0 The benefits of social media for a small business

Ask any advisory business how they grew and many, if not all, will mention the power of referrals. These recommendations of their experience, empathy and expertise have come from satisfied clients. Friends, family and acquaintances, providing a stream of warm leads to enable a business to grow. In the future these endorsements will be just as valuable, but the way in which they'll be given will change and evolve. Yes, many will continue to be given by word of mouth, but more and more will be provided using the power of social media which has so many benefits for the UK advice market.







Unlike any other form of marketing, social media allows you to engage directly with your prospects and clients in a 2-way dialogue. It allows other people to look over your shoulder and see what you have to say and what others have to say about you.

Social media allows you to connect with your audience (i.e. clients, prospects and peers) in a way that:

- ✓ Demonstrates your authority and relevance
- ✓ Shows your personality
- ✓ Gives insights into the types of people you communicate with and the sorts of conversations you have
- ✓ See what others think of you.
- ✓ Connect on a personal level.

Consequently this can:

- ✓ Immediately raise your profile amongst potential clients, the adviser community and those within the industry at zero financial cost
- ✓ Increase referrals as it helps prospects see what sort of business you offer
- ✓ Build upon existing relationships by providing clients with knowledge, support and news to help them better manage their financial lives
- ✓ Drive website traffic
- ✓ Raise the profile of your company



**What are the benefits to your business of social media? (Please add your thoughts here)**

A large empty rectangular box intended for the user to write their thoughts on the benefits of social media to their business.



## 6.0 Getting started with social media

Social media is just another marketing tactic that allows a business to communicate with its existing clients and new potential customers. It is not some panacea for all ills and it certainly is not a dark art only understood by experts.

Any small business can and should embrace social media as part of their marketing effort and success will be achieved if you follow a few simple steps:

### 6.1 Decide why you are using social media

You need to be clear on a number of issues before you start:

- ✓ What is your reason for using social media?
- ✓ What will social media add to your business and existing marketing?
- ✓ Do you want to engage more closely with the clients you have or do you want to recruit new customers?
- ✓ Do you wish to develop relationships with peers and possible alliances?
- ✓ Do you wish to position yourself as an expert in your field?
- ✓ Do you want to drive traffic towards your website or Facebook page?

### 6.2 Decide who you want to talk to:

You need to be very clear about who you want to engage with on social media:

- ✓ What are the profiles of the clients you want to communicate with?
- ✓ What age are they?
- ✓ What are they interested in?
- ✓ What do they value from you?
- ✓ What will make them want to talk to you?
- ✓ What social media do they use and not use?
- ✓ Who do you not want to deal with?



## 6.3 Set your goals

As with any marketing activity you need to set social media goals:

- ✓ Is it to increase brand awareness?
- ✓ Gain new clients?
- ✓ Retain existing clients?
- ✓ Develop new alliances?
- ✓ Highlight your expertise?

It can be any or all of these. You set the goals that matter to you. However, no matter the goals you choose, please ensure they are SMART:- Specific, Measurable, Attainable, Reasonable and Targeted. This ensures you can actually know if you have been successful or need to go back to the drawing board.

## 6.4 Choose the right platform

When you start social media a common mistake is being active on too many social media sites. It may appear exciting at first, but over exposure in social media can result in you trying to do too much too fast. It can also mean you don't get full benefit from the social mediums which best suit your business and clients.

Start slowly and select one site that matches your objectives and goals. Then focus your attention on learning as much about it as you possibly can. You can then move on to others when your satisfied you understand what you are doing.

## 6.5 Protect your brand

Social media is by its very nature person to person and as such each of your social media accounts will contain personal information as you complete your profile and show people who you are.





Be sure to completely fill out your profile on any social media sites you use. Consistency is vital when it comes to social media, especially as you begin to explore more than one platform.

Not only should you complete your profiles, but it's also a good idea to keep your data as consistent as possible across all of your social media applications. This will aid in recognition, broaden reach, and help any ongoing communication with the same contacts on multiple platforms.

## **6.6 Be a lurker and a follower**

No one is a social media expert straight away so take time to learn from the best and follow those who you feel do it well. You can see the tactics they employ and begin to see the reactions they receive.

You can then decide the tactics you would like to use and put your personal stamp on the activity that you know works with the people you want to target.

## **6.7 Establish a voice**

Consumers are actively seeking relationships with brands that have a clear voice and tone.

- ✓ Your social media voice: This is an extension of your brands personality and should describe your communication style. Is it informative, formal, informal and clear and concise or chatty and conversational?
- ✓ Your social media tone: This on the other hand is how you apply your voice. This can differ across social media channels as you target different audiences or even promote certain elements of your proposition.

It's important to remember that while Voice and Tone are similar, it's helpful to think of them as separate concepts.



Your brand's voice should remain consistent across all communication platforms. Tone, on the other hand, might differ across social channels depending on the audience and special circumstances. For example on some platforms you will wish to remain formal and on others informal and chatty.

## 6.8 Create your social media personality

The best way to discover your brand's voice is to develop a personality for your brand or what some call a brand persona. You can do this by answering a series of questions while keeping your target audience in mind.

I'd advise you to sit down with your team members and other key stakeholders to answer the questions below. For each brainstorm a list of adjectives that you'll use afterward to craft your voice and tone:

- ✓ What are our brand and personal values?
- ✓ What sets us apart from similar brands and your main competition?
- ✓ How do you want to be portrayed? What reputation do you want?
- ✓ Who are you creating content for?
- ✓ What does our audience look like?
- ✓ Why are you on social media?
- ✓ What do you want to offer your audience?
- ✓ How does your audience communicate with you and others on social media?  
What language and tone do they use?
- ✓ What don't you want to be described as?
- ✓ When can you use humour and when is it inappropriate?

The answers to these should help you craft an identity or persona on social media which protects your brand and grows your followers.



## 6.9 Enjoy social media

Finally enjoy social media and do not be afraid to test new platforms and methods of communication.

The best way to enjoy social media is very simple, treat people how you would want to be treated and never say anything on social media you would not be comfortable saying face to face.

If you follow this advice you won't go far wrong. Regardless of your feelings on social media, all the evidence shows that for every demographic and every age group the social media tsunami has lost none of its power.

Social media is a just a marketing tool and can be leveraged to your advantage with planning and practice so take advantage of it, if you want to survive and thrive.

If you follow the simple advice outline above then you should not only enjoy the experience but profit from it. Remember, your target audience is already on social media. They are already talking to brands and your competitors now!

If you want to retain your clients and reach out to new customers, then it's time to get involved in social media or enhance the way you do it. Now it's time to write down your own thoughts.



**Why are you using social media? (Please add your thoughts here)**

**What is working for you?**

**What would you like to do better?**





## 7.0 Getting started with Facebook for business

### 7.1 Create your page

Go to [facebook.com/business](https://facebook.com/business) and click **Create a Page** in the top right hand corner. You'll be offered several business type options including local business or place, brand or product, and cause or community. Select the type of business you're creating the Facebook Page for. If your business type falls into more than one of the category options, choose the one your customers are most likely to think of when they think about your business.

When you click on a business type, a box will open asking for a few further details, like the name of your business, your address, and your Page category. Categories are basically sub-types within the larger business category you've already chosen. When you start typing in the category field, you'll see a list of potential category options to choose from.

When you're ready, click **Get Started**. Note that doing so indicates your acceptance of Facebook's terms and conditions for Business Pages, so you might want to check those out before you proceed.

### 7.2 Manage your profile

Now it's time to upload your profile and cover images for your Facebook Page. It's important to create a good visual first impression. Make sure the photos you choose align with your brand and are easily identifiable with your business.

You'll upload your profile image first. This image accompanies your business name in search results and when you interact with users, and also appears on the top left of your Facebook Page.

Your logo is probably a safe way to go.



Your profile picture will appear as a square on your Facebook Page, but will be cropped to a circle in ads and posts, so don't put any critical details in the corners. Once you've chosen a great one, click **Upload Profile Picture**.

Now it's time to choose your cover image, the most prominent image on your Facebook Business Page. This image should capture the essence of your brand and convey your brand and business personality. It will display at 820 x 312 pixels on desktop or 640 x 360 pixels on mobile. The image must be at least 400 pixels wide and 150 tall.

Once you've selected an appropriate image, click **Upload a Cover Photo**.

### 7.3 Add a short description of your business

This is your opportunity to tell people about your business. It should be just a couple of sentences (maximum 155 characters).

Click **Add a Short Description**, then just share what your customers need to know as clearly and concisely as possible.

### 7.4 Create your Username

Your username, also called your 'vanity URL', is how you'll tell people where to find you on Facebook. Your username can be up to 50 characters long, but don't use extra characters just because you can. You want it to be easy to type and easy to remember. Your business name or some obvious variation of it is the most appropriate choice.

Click **Create a Username for Your Page** to set up your vanity URL.

Click **Create Username** when you're done. A box will pop up showing you the links people can use to connect with your business on Facebook and Facebook Messenger.



Click **OK** to continue filling in your Facebook for business Page details.

## 7.5 Complete the about you section

While you might be tempted to leave the details for later, it's important to fill out all of the fields in your Facebook Page's **About** section right from the start. As Facebook is often the very first place a customer goes to get information about you, having it all there is extremely important.

It's also a good idea to list information such as your customer service process, online hours and estimated response time.

To get started, click **About** in the left-hand menu of your Facebook Page.

From this screen, you can add or edit your specific business details, like your start date, contact information, and other social accounts.

This is also the screen where you can add a longer description of your business. Click **Edit Story** on the right side of the Page to provide a detailed description of what your business offers customers and why they should Like or Follow your Page. This is a great place to set expectations about how you'll interact with people through your Facebook Page and to offer a compelling reason for them to engage with you online.

To specify your business location and hours, click **Edit Page Info** on the top right of the screen. When you're finished, click **Save Changes**.

## 7.6 Creating your first post

Before you start inviting people to like the Facebook Page for your business, you'll want to make sure you share some valuable content. You can create some of your own posts, or share relevant content from thought leaders with information you feel will benefit your clients and potential customers.



You could also create a more specific type of post, like an event or product offer. There is an option to allow you to click through the tabs at the top of the status box to bring up all the possible posts.

Make sure that whatever you post offers value for your visitors when they arrive at your Facebook Page, so they'll be inclined to stick around.

Your Facebook Business Page now represents a robust online presence that will make potential customers and fans feel comfortable interacting with you.

## **7.7 Engage with your clients and alliances**

Now you're ready to give your Facebook Business Page a bit of a boost. Invite family and friends to like the Page. Use your other channels, like your website, LinkedIn and Twitter, to promote your page.

Add "follow us" logos on your promotional materials and/or email signature. If you're comfortable with it, you can even ask your customers to review your business on Facebook, too.

## **7.8 How can you use Facebook in your business? (Please add your thoughts here)**





## 8.0 Getting Started with LinkedIn

### 8.1 What is LinkedIn?

LinkedIn is the world's largest professional network and growing rapidly. LinkedIn connects you to your trusted contacts and helps you exchange knowledge, ideas, and opportunities with a broader network of professionals.

Many people who are getting started with LinkedIn think that it's just an electronic CV. This may have been the case a few years ago, however these days it's a very powerful social media tool that can increase your chances of getting found on Google, help position you as an expert in your field, and bring you opportunities to win new clients and business opportunities.

With this in mind, your profile should read as an elevator pitch for you and help position and build your personal brand.

Your LinkedIn profile will bring you much more online exposure. LinkedIn profiles rise to the top of search results, letting you control the first impression people get when searching for you online. You can also ask your potential clients to look at your LinkedIn profile before they deal with you.

### 8.2 Your LinkedIn profile

I would like to show you the key steps in getting started with LinkedIn

The first is simple go to [www.linkedin.com](http://www.linkedin.com)

Creating your LinkedIn Profile and account is easy. Simply fill in a short registration form, and that's it. You have a free personal LinkedIn account. However, you now need to spend time considering how you want to present yourself and how prospective connections might view you when reading your profile.



It's not uncommon for people you don't know to find you on LinkedIn through their networks. Your profile is your personal elevator pitch; make sure it leaves a good impression.

The next stage is to gather the information you'll need to complete your profile, including:

- ✓ **Headline description:** this displays beneath your name, along with your location and industry, every time you appear in a search—it is vital you reflect on what you want people to see. This is your electronic first impression. This sells your personal brand.
- ✓ **Past employment and experience and your current role.** This is to highlight your experience and expertise
- ✓ **Education and qualifications** again promotes your expertise
- ✓ **You can list up to three websites in your profile,** it is useful as connections can link and view these
- ✓ **Public profile URL preference.** You have the opportunity to edit your public profile URL. The most sensible approach is to just use your name.
- ✓ **Remember to have a strong summary** which you should think of as your 30 second sales pitch to potential clients and alliances
- ✓ **Complete specialties and interests,** remember we are people, so feel free to include hobbies and interests
- ✓ **Edit your public profile settings.** You can elect to show nothing in your public profile all the way up to everything. Remember, the more you show, the more people outside your network can learn about your services, expertise, and skill set
- ✓ **Build your recommendations.** Do not be afraid to ask for recommendations from colleagues, employees, connections etc. Also be willing to give recommendations. These strengthen any profile and again highlight the value you can add in your chosen area of expertise.



## 8.3 Making connections in LinkedIn

Once you have a complete profile, the next step is to connect with people you know. In essence, the more connections you have, the more your name will appear in LinkedIn searches and the more chances you have of being found by your target audience.

LinkedIn offers four ways to invite people to connect:

- ✓ Manually enter the first and last name and email address of each person you want to invite
- ✓ Import contacts from Outlook or your Web-based email account (LinkedIn will check the email addresses and let you know which of your contacts are already on LinkedIn)
- ✓ Colleagues search (LinkedIn will show you the names of all the people who share a common employer with you)
- ✓ Classmates search (functions the same as the colleagues search).

It can be very impactful not to use the standard invite but to personalise your invite, this does increase your chances of achieving a connection.

## 8.4 Getting the Most Out of LinkedIn

You get out of LinkedIn what you put into it. The good thing is you don't have to invest a lot of time and money to see results. The key is starting with a good profile, and then tapping into the various ways LinkedIn lets you connect with people within and outside of your network, such as:

- ✓ Joining groups related to your areas of interest and expertise.
- ✓ Using the Intel LinkedIn provides, a good LinkedIn profile can give you the market intelligence you need to target good-quality prospects, as well as an insight into the solutions you may want to present to them. It allows you to break the ice and start talking to people on a personal rather than business level.



It is a valuable investment to spend time on your home page reviewing what people in your network are doing:

- ✓ It offers you an easy way to stay connected and top of mind with people in your network, because it gives you a reason to reach out to them based on something they've posted
- ✓ Someone in your network might connect with someone else that you know who isn't yet in your network
- ✓ You may find new LinkedIn groups to join
- ✓ You can see at a glance what's happening in your groups and participate as appropriate
- ✓ Depending on the applications that you've installed, you can see upcoming events, read blog posts of people in your network, create or participate in a poll, and more.

Do look into LinkedIn and give it a try as part of your client proposition. It is no longer an online CV, it is fast becoming the business Facebook.

### **8.5 How can you use LinkedIn for your business? (Please add your thoughts here)**



## 9.0 Getting started with Twitter

Every month 328 million active users are chatting, connecting and sharing opinions on Twitter.

Twitter active users send over 400 million tweets per day, but does it work for business and what exactly is an active user?

Firstly, Twitter has identified an active user as an account who follow at least 30 other accounts, and have one-third of the people they follow engaging back with them. This means they are an active participant on social media.

They are real consumers seeking advice, solutions and willing to engage with the businesses that can provide them with products and propositions that meet their needs.

Active users are also promoting the positives and negatives of their interactions with brands providing both opportunities and threats for any business involved in social media.

Let's now look at the second point. Is Twitter useful for a small business? We believe it is essential, because no small business that wants to thrive in the future can choose to ignore social media and Twitter in particular.

The most fundamental reason for this is, because if a business is not involved in the digital lives of their existing clients and potential customers are they really involved at all in their lives and are they relevant to these people?

If not there is a danger of losing business to those that are using social media effectively.





## **9.1 Twitter builds stronger relationships with your clients**

The very nature of Twitter allows you to build a more interactive and authentic relationship not only with your existing clients but with potential customers.

Relationships are the bedrock of any small business client proposition and Twitter is the ideal platform for your business and key individuals within it to position themselves as experts in your business field. It's also a chance to showcase the work you have done for other clients and promote the skills you have within your organisation.

## **9.2 Twitter makes your website more efficient**

As you build your Twitter following and if you use it correctly by providing content people want to read and find interesting, they will want to know more about you and your business. Your account should include a link back to your website where you can showcase your proposition and business in more depth.

Twitter like all social media can and should increase traffic to your website. If your business just has a website alone, then this means you are missing out on a valuable opportunity to promote yourself.

## **9.3 Twitter can turn cold prospects into warm leads**

47% of Twitter users say they are more likely to visit the website of a business if they see content that interests them. If your Twitter page provides a compelling reason to visit your website then when they visit it they are more likely to take on board the key messages you have.

One tip, please ensure the landing page that you link to is formatted to collect the name and contact details of any visitors. This allows you to build a contact list for offers and marketing.



One way to ensure that you have an attractive reason for a visitor to supply their contact details is to offer a free download and a special offer draw usually works well.

## **9.4 Twitter can go viral**

Social media success is about spreading your message and Twitter had the ability to send your thoughts, offers and business viral if done correctly. A good communication on Twitter can help spread your business to hundreds even thousands of new potential customers.

## **9.5 Twitter allows you to hear back from your customers**

As we have seen once you begin a Twitter connection with your clients the information exchange should evolve to become 2 way. This allows you to obtain the feedback you want on how they value you, what they want from you and what they would like you to improve. Twitter is not just about promotion it is also about listening and this can help your business in the future.

## **9.6 Twitter builds your brand**

Twitter is not just for the big organisations. Any business can build a presence on Twitter with relevant and engaging posts that promotes their proposition. Your brand is your promise to your clients and future customers. Social media is just one element of how you communicate this, but a medium which is growing in influence and impact and remember it's free.



## 9.7 Twitter supports your existing marketing

Social media and Twitter are just marketing tactics and like any other element of your marketing activity they have to be part of an overall plan. If you're clear about your objectives right from the start then you can set social media goals that can drive your business forward. But remember, no plan just means chaos and overtime your social media impact will not be as impactful as you want.

Consider where Twitter can help in your marketing mix. It does work and many companies have already used it successfully. The key is to ensure that whatever strategy you use that you have a human voice behind it, communicating the brand message and networking with customers, business associates and industry colleagues.

After all the secret to success on social media is in the name, Social.

## 9.8 Twitter hints and tips

Never forget you are talking to people and never neglect the human element of engaging on Twitter. The culture of Twitter soon becomes apparent through regular use but as more and more people embrace social media and Twitter in particular to communicate, let's look at some tips that can help you enjoy it and gain more followers:

- ✓ When you start, have a complete biography and have a picture, people want to know who you are and what you do and how you can be part of their community. Even if you're on Twitter a while please ensure you have your biography updated and please, please, please use a picture
- ✓ It's helpful to be as transparent possible to ensure Twitter has no implications for you or your business account
- ✓ Be yourself. It is OK and welcome to be different on Twitter. Life can be boring enough without making social media a yawn



- ✓ It's OK to follow people you don't know on Twitter. They can choose whether or not to follow you back. In the first instance follow people who can educate, inform and influence your ideas
- ✓ It's OK to unfollow people on Twitter. Unfollowing doesn't automatically mean "I don't like you." There are many other reasons as you will no doubt find out!
- ✓ It's OK to @reply someone a question or comment vs direct message, especially if it's an idea where others might weigh in or add a perspective
- ✓ It's better to direct message someone if you're making 1:1 plans or having a focused, personal conversation
- ✓ Promoting others and talking with others is a great way to show your participation to the Twitter community
- ✓ You don't have to read every tweet
- ✓ You don't have to respond to every @mention
- ✓ You aren't obligated to reply to every direct message, however, the more you can respond, the more people tend to stay with you and build relationship
- ✓ When retweeting other people's works, it's okay to truncate a bit to be able to retweet. Please preserve the link and also the original person's Twitter name. I'd also urge you to read every tweet thoroughly that you plan to Re tweet. This ensures you agree with the content, sentiment and tone of the tweet and don't fall into the trap of endorsing a view that can be detrimental to your own views or the image of your business
- ✓ If you're running a customer service Twitter account, it's polite to follow back the people following you
- ✓ People might unfollow you if you tweet excessively or bore them to death!
- ✓ Check your links before you tweet them!
- ✓ Use a URL shortening tool such as **bit.ly** to link to web pages in your tweets
- ✓ If you are on Twitter be sure and follow us at [www.twitter@PanaceaAdviser](https://www.twitter.com/PanaceaAdviser) If not why not try the growing world of Twitter you can join here at [www.twitter.com](https://www.twitter.com) .



**9.9 How can you use Twitter in your business? (Please add your thoughts here)**

A large empty rectangular box intended for the user to write their thoughts on how to use Twitter in their business.





## 10.0 Getting Started with You Tube

Video and multimedia content is increasing popular amongst users of Social media and it's easy to get a business You Tube account set up.

1. Sign into an existing Google account, or create a new, dedicated account specifically for your YouTube business channel.
2. Once you've created your Google account, make your way over to YouTube's homepage.
3. On the YouTube homepage, click on the avatar icon within the top right corner of the screen.
4. Click on "My channel" from the drop-down options.
5. For **personal YouTube** account creation, input your first and last name into the required fields. For **YouTube for Business** account creation, click "Use a business or other name" which will lead you to a screen where you can enter your brand's name.
6. Click "Create" to activate your new YouTube account.

Remember you can either create a new, dedicated account specifically for your YouTube business channel *or* use an existing, personal account.

Creating a new login is often ideal as you don't have to worry about security issues tied to your personal Gmail. This is also a good idea if you'll be sharing the account with others. Ultimately, the choice is up to you.

Remember, you don't have to use your business' name when creating a Google account. YouTube gives you the option to use a business name or your own.



**10.1 How can you use Video content in your business and social media activity? (Please add your thoughts here)**

A large, empty rectangular box with a thin black border, intended for the user to write their thoughts on the topic of video content in business and social media.



## 11.0 Your Social Media Marketing Plan

Every business that wants to maximise its marketing efforts and spend has a marketing plan, so why not have a social media plan?

### **The first thing you need to do is write down your marketing goals**

The worst thing anyone can do is to be sucked into social media without knowing where you want to go, who you want to speak to or what success will look like? Once you write these goals down, you have the foundations for your plan and the rest is about how you execute and evaluate your activity.

### **You now need to describe who your audience is on social media.**

It's wise to make them real and create an identikit of your target market. Discuss this with those in your company who will be using social media to ensure you are all in agreement.

If you get your identikit right you can make your market real and better understand what motivates them, what excites them and what will make them want to interact and deal with you and your proposition. This is an important stage, because marketing is no dark science, it's simply the right message to the right people at the right time.

If you get your message and market wrong, then success will be hard to achieve.

### **Develop your social media content strategy**

Once you have made your potential audience real and defined your identikits, you will now have a better idea of the messages they will respond to and be excited by.

You should always give yourself this test with your content strategy.



## **‘Will this post excite enthuse and engage with the people I want to deal with?’**

If not why are you bothering posting this message?

Too much social media content is ignored because it’s a vanity exercise by the posters. Please do not fall into that trap.

When developing your content strategy, also be clear on the images you will use for each of the target markets you have identified. These are just as important as any text and will aid engagement and responses.

## **Be clear about what you want people to do when you speak to them!**

This is a trap many people fall into when getting started with social media, they don’t know what they want people to do with the social media posts they send out. Are they to drive traffic to your website? Create awareness or direct people to purchase your proposition? You need to decide right at the beginning and document in your marketing goals, what your call to action or actions will be.

This will help you gain real value from your social media marketing.

## **Document the social media you will use and will not engage with**

This is vital, time is your most precious commodity, so don’t waste it on social media platforms that won’t give you the results you want and need. If you have identified the clients you wish to engage with correctly, part of that exercise will be selecting the social media platforms they use or are most likely to use.

This is where you should then spend your time and effort.

Avoid the temptation that many fall into, which is to try and do a little bit on a myriad of mediums when focused activity on just one or two platforms can give greater



returns. This is again, however, down to doing your homework, so take the time to get it right.

## **Do it, experiment and if it works do it again**

Once you have carried out the steps above and documented these in your plan it's time to execute your strategy. Make sure you devote the required time and resources to delivering the plan you have created. Be creative and don't be afraid to take calculated experiments based on your goals and client identikit. For example, with Twitter, tweet different things, pose your questions in different ways, try different days and times and see which tweets get the most traction and clicks.

This allows you to determine the best way to reach your intended audience and what strategies get the most positive reception.

## **Put client engagement at the heart of your plan and engage directly with your audience.**

The biggest opportunity social media marketing offers your business is the ability if done correctly to have conversations with your clients and future customers in real time.

All the research identifies that clients want to talk to and appreciate organisations that feel authentic, informal and relevant to them.

These conversations are likely to happen when you respond directly to an individual follower, rather than solely relying on posts to your entire following.

While every organization's content strategy should be uniquely tailored, it's always worth looking for opportunities to engage directly with your audience. It's also vital in





your social media marketing plan to identify who in your business will and who won't respond to comments on social media.

## **Measure, measure and measure again**

In your social media plan you need to outline what success and failure will look like. During the experimentation stage it is vital to test, experiment and measure your social media execution. Your measures should help you decide if what you are doing is working.

Measuring can include mentions in blogs, tags, tweets, news articles and other forms of exposure for your business.

## **If it works keep doing it**

Billy Connolly the great comedian was once asked, 'how do you lose weight?' His sage advice was. 'Eat less and move more'.

Success on social media is just as simple, do more of what works and less of what doesn't!

Here is a simple blank template you can use to help draft your social media marketing plan.



**11.1 Social Media marketing plan**

**What is the specific goal that you want to achieve?**

**Why do you want to achieve this goal?**

**Where are you currently starting from as it relates to this goal?**

**How will you achieve this goal? List each individual action step and deadline.**

**Who will be involved in helping you achieve this goal? Identify their specific role.**

**When will you achieve this goal? Identify a specific date**



## 11.2 Your Social media audience

<b>Profile Identikit – Describe the segment as you would to a stranger</b>
<b>What do they want from you?</b>
<b>What do they need from you?</b>
<b>What do they expect from you?</b>
<b>What do they Value from you?</b>
<b>What social media do they use?</b>



**11.3 Your Social media calendar**

Your social media calendar week commencing

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

<b>What will you say?</b>	<b>Who will you say it to?</b>	<b>When will you say it?</b>	<b>What medium?</b>	<b>Results</b>



### 11.4 Social media plan tracker

Stage of plan	Owner	Date due/Progress
Goals		
Target market		
Content		
Testing		
Financials		
Measurement		





## 12.0 How to make your social media impactful and profitable

Remember, any social media activity in your business should have one ultimate aim in mind; to increase profitability either from existing clients or from new customers, or both.

If this happens, then social media is not a chore or a hobby, but a key part of your business.

Here are some useful hints that can help you once you have a social media plan

### **Create community**

In order to use social media effectively, you will be focused on creating an online community, providing your followers with updates, downloads and advice - not pushing your latest product. Social media is just like running an event:

- ✓ You share a valuable piece of content with your networkers (users of Facebook, Twitter, LinkedIn)
- ✓ It causes them to interact and share their views (reply, comment, like)
- ✓ They recommend you to their followers (If they like, comment, reply on your content, it will appear on their news feed for their 'friends' to see)
- ✓ Their followers can recommend you too
- ✓ And the social cycle continues...

So for every one like, share, comment, reply etc. your content is reaching another set of followers. One of the best ways to show your authority and relevance to a prospect is to create content that demonstrates this. Content can be created in-house or outsourced if time is an issue. If you're going to outsource then make sure you work together with someone to help you create and share content relevant to your expertise and your prospects, to really impact your social media efforts.



## **Email and Newsletter Marketing**

You may already produce a client newsletter and issue this by email or post. You can also publish newsletters on social media sites with the option to sign up to the newsletter. This often leads to prospective customers visiting your website and can be a useful way to attract referrals.

## **Use Video content**

Video and multimedia content is a preferred activity amongst users. According to the Yahoo Small Business Advisor, consumers are 46% more likely to investigate a product after watching an online video about it. Followers can trust and see what your products/service actually offers. People are watching your videos for a reason; to take something away from it or help them find a solution so make sure your video does this. Informative and entertaining videos are more likely to be shared or recommended by followers to their own networks.

## **Post a mix of content**

Keep your followers engaged with a range of content including changes in regulation or laws with positive or negative impacts, useful tips and advice, free downloads. The wider range of content you provide on subjects that interest your followers, not you, the more likely they are to interact. Ask questions, such as, what would your followers do in certain situations? Get them thinking.

## **Share content from others**

Post content from other news sites, online sources or social media accounts that may be of interest to your audience. Put your own angle or opinion in the post or give your followers a reason why they should read it. Include any news or advice that will help your audience so you are still providing information that is relevant to them.



## **Make any offer clear and concise:**

- ✓ Outline what type of content your followers can expect from following your page
- ✓ Use these words: updates, advice, guidance, tips, news etc.
- ✓ Include a call to action to encourage followers to contact you or visit your website.

## **Vary the language you use:**

- ✓ Use phrases such as 'interact with us' on your website/social media links
- ✓ Instruct followers what they need to do - become more pro-active than just 'follow' and 'like'
- ✓ Encourage your followers to get involved and share their views/comments.

## **Make sure your posts have REACH**

- ✓ **Resources:** Does your content include an incentive, free templates, downloads, checklist or diagrams to assist them?
- ✓ **Ego hook:** Do your posts include positive market research, would flatter them or get them thinking about themselves?
- ✓ **Announcements:** Is the subject of your post newsworthy?
- ✓ **Contentious:** Can you offer a contrasting viewpoint to a subject that is of interest to your followers to spark discussion?
- ✓ **Humour:** Can you add personality to your posts by including informative, funny videos or images that implicitly apply to your theme or subject?

## **Become a resource center for your clients**

Useful content can be an excellent resource for customers, so becoming a resource center means customers will place a higher value on your business. You can take topics related to your company and create podcasts, videos, and articles. It's a helpful way to attract links from other sites and allow the customer to share the information, bringing more traffic back your way.



## **Promote your expertise in the press**

Another way to boost customer awareness is through promoting any mentions in trade publications and local business media. It also lends more credibility to your business, which, in turn, can create new business. This one takes a bit of time because you will need to compile a list of local business bloggers, editors, and writers and then make inquiries regarding your business contributing articles to their sites. Some business blogs will have a monthly or weekly guest blog post, for example. That guest could be you! It's an excellent way to get more exposure to a new audience.

## **Ensure your website is mobile friendly**

39 million consumers in the UK are mobile social media users it's vital for any business to ensure that their website can be easily viewed on mobile devices. If not it's something to sort before rolling out any social media strategy.

## **Promote your accounts**

Use emails, events and marketing materials to invite people to connect with you on social media.

## **Connect with prospects and clients**

After a phone call or in-office meeting with a prospective client, look them up on LinkedIn and send an invitation to connect. This will help you stay top of mind.

## **Become a blogger!**

Business is all about service, it's what we provide and it's what we charge for. Key elements of that service include professional expertise and the experience gained providing help and solutions for clients their friends and family. The challenge for many firms is twofold, how do I sell and promote my experience and expertise and



then how do I make this real for existing and prospective clients? Many firms are using social media to do this and a growing number of businesses are now using blogs to communicate to clients as part of their on-going service proposition.

They are an excellent way for any business large or small to showcase its expertise, drive additional traffic to their existing website or the site of strategic alliances.

However, the most important benefit of a business weblog is that it allows you to connect directly with your clients. Read on to see how you can start blogging now.



## 13.0 Blogging- why it works

### What is a blog?

A blog is a web page that is usually a short impactful regular view from an individual or a company. Blogs have boomed in the last few years as the number of weblogs has grown dramatically from a few hundred thousand to over 200 million.

There are two main types of blogs:

- ✓ Personal blogs – this is usually a personal diary, opinion posts or views on a hobby
- ✓ Business blogs- these are a communication tactic for small medium and large corporations to communicate with clients then share expertise and information.

### Why a business blog makes sense

- ✓ Blogging is easy - Simply write your thoughts, link to your web page, and publish to your blog, all at the push of a few buttons. Blog software companies WordPress or BlogSpot offer easy blogging tools to get started.
- ✓ Blogging saves money - For small business owners without the time to learn web HTML or the money to hire a designer/developer, blogging offers an inexpensive method to get communicating with your clients
- ✓ Blogging is quick - Most businesses don't update their website frequently. A blog allows you to provide up-to-date information to your customers quickly and easily. It's much easier to update a blog than your website, and it requires no special technical skills.
- ✓ Blogging shows your for real - They provide you with a chance to share your expertise and knowledge with a larger audience.
- ✓ Blogging Increases your visibility in search engine results- As you blog about topics, you increase your business visibility in search engine results for those topics. A business blog with posts written around your most desired search results raises your visibility, making it easier for potential customers to find you.





- ✓ Blogging can position you as the expert - Your blog gives you the platform to demonstrate the expertise and service you can offer your existing clients and promote you to potential prospects.
- ✓ Blogging can make you money – A blog can be an integral part of your on-going service proposition and can be included in any or all of the propositions you offer clients.

For an example of a business blog why don't you check out your competitors it might give you the inspiration to start your own!



## 14.0 Social Media compliance for advisers

Developing and then implementing a social media strategy that's both impactful and compliant can be a challenge. Here are the key compliance points every firm should know.

### Financial Promotions

Social media posts can be a financial promotion where the post includes “*an invitation or inducement to engage in financial activity.*” Your business will need to ensure that social media communications comply with FCA financial promotions rules, including those around risk warnings and past performance. The overarching requirement is that all communications must be “*fair, clear and not misleading.*”

### Precise targeting

Any individual social media update can be re-shared very quickly beyond your intended target audience. Precise targeting of specific audience segments (for example, with advertisements) will help mitigate this risk.

### Highlight potential risks

Financial products and services must be promoted in a balanced and responsible manner. This means potential benefits and risks must be communicated clearly.

### Beware character limitations

Character-limited social platforms such as Twitter can easily lead to ambiguity, particularly with complex features of financial products or services. If you're restricted by character limits, consider adding a link to a disclaimer in your main content or visual.



Whether it's a tweet or a Facebook post, each social media communication in isolation must be compliant.

## **The use of images**

Images are recommended as helping overcome character limitations on social media networks such as Twitter, as additional wording and messages can be conveyed easily and unambiguously.

## **Sharing or forwarding communications**

Although any social media update can be shared or forwarded by others that see it, the responsibility lies with the originator. In other words, if the original update does not comply, non-compliance remains the responsibility of the originator and not of the person re-sharing the update. Firms should take steps in labelling and targeting communications to mitigate the risk of someone sharing noncompliant content.

## **Unsolicited promotions**

The FCA stresses that any marketing communications sent electronically must comply with specific legal requirements regarding unsolicited promotions. Someone liking or following your social page doesn't mean they've consented to receive cold calls for financial promotions.

## **Approval and record-keeping**

Don't rely on the social networks to record your communications. Solutions such as **Proofpoint**, **ZeroFOX**, **Smarsh**, and **Actiance** can help you securely archive all social media communications to ensure you comply with record-keeping regulations.



## **Sign-off process for social media posts**

A person with “appropriate competence and seniority within the organisation” should sign-off on digital media communications.

## **Actively monitor your online presence**

Check reviews on third party sites and be proactive. If a client posts a dissatisfied comment, follow up with them via email, thanking them for their feedback and soliciting constructive criticism for the future.

## **Turn on reviews**

Previously not allowed, Facebook reviews have now been ruled compliant. If you previously turned that feature off, you can allow it now, making your company more accessible and searchable.



## 15.0 Your social media compliance checklist

### **Adopt a social media policy**

Having a clear and comprehensive social media policy allows firms to remain compliant while giving employees the guidance they need to safely and effectively engage with clients and prospects online.

Creating a well thought-out social media policy involves input and feedback from those responsible for compliance, legal, IT, information security, human resources, public relations, and marketing.

It should address specific platforms, provide device and access restrictions, and specifically allow or ban certain social activities, from accepting connections to posting business-related content. These guidelines should aim to limit confusion but also encourage participation.

### **Set up a training process**

Many employees are reluctant to use social media for business purposes because they're unfamiliar with the platforms or are unsure of best practices. Of the advisors who don't use social media, many cite a lack of knowledge and understanding of how to generate business benefits as the reason.

Providing quick courses, recorded webinars, best practices guides, or other resources for employees can help boost employees' social media engagement and ensure that they're using the platforms effectively and appropriately. Regular updates to these training materials can help employees keep up with social media trends and changes as well.



## **Establish workflows and processes**

Make sure all team members know who can post updates and to what platforms. Consider setting up an approval process, in which junior staff members, and others are allowed to draft posts but must receive permission before publishing them. This can help firms avoid both minor and major problems.

It's also important to establish a crisis management plan. If something goes wrong, knowing how it will be handled and by whom, can help stop the problem from escalating and causing reputational damage.

## **Archive everything**

One of the biggest hurdles to compliant social media use is the archiving requirement. All business-related communications must be recorded and filed. It is critically important that this is a key element of your social media implementation plan.





## 16.0 Summary

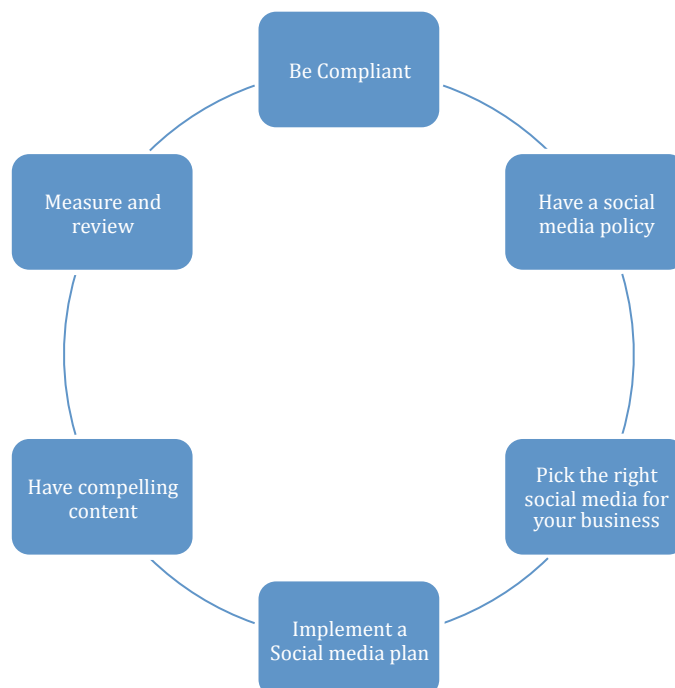
Traditionally businesses have relied on face to face engagement, word of mouth recommendations and referrals to promote what they do. However, as we have seen the way in which our society recommends and refers is changing and while face to face is still vitally important, social media is now becoming more and more impactful. The successful business of the future will need to embrace the like, recommend and follow culture or miss out on potentially revenue rich opportunities.

This is best illustrated in the quote from Scott Cook the Social media guru.

*'A brand is no longer what we tell the consumer it is – it is what consumers tell each other it is'*

However, it is not enough to just use Social Media, it needs to be utilised in the right way.

Make sure you have a plan in place and are communicating effectively in order to make the most of it and always remember to protect your brand at all times. Consider this virtuous circle:





Hopefully this guide has gone some way to help you understand how Social media can help grow your business. There are many other resources in place to also assist, the Panacea Adviser website has a vast amount of information, just visit <http://www.panaceaadviser.com/learning+development>.



## 17.0 About Us

### 17.1 Panacea Adviser

Panacea Adviser is a unique and **free** resource that supports financial advisers, mortgage brokers and paraplanners by providing easy online access to the very latest news, views, tools, research, educational support and business development ideas from product providers and support services all in one place. It started fourteen years ago, is a great user of social media and is a classic example of Scott Cook's quote above in action "*it is what financial services professionals tell each other it is*"?

<http://www.panaceaadviser.com>

### 17.2 Glassagh Consulting

John Joe McGinley, Head of Glassagh Consulting can help you make the ideas you have for your business a profitable reality. If you desire help with any of the following:

- ✓ Making your vision work for your business
- ✓ Segmenting your clients
- ✓ Developing a sustainable, attractive and profitable customer proposition
- ✓ Using social media to attract new customers and communicate with your clients
- ✓ Identifying the right technology for the future of your business
- ✓ Defining and implementing profitable processes for your business
- ✓ Motivational team building

[www.glassaghconsulting.com](http://www.glassaghconsulting.com)



## 17.3 NMBA

The NMBA is a not-for-profit organisation and is committed to supporting the whole financial advice profession by improving access to and the quality of advice.

We support a community of thousands of advisers, leading the way in providing advisers with specialist training support, working in collaboration with leading industry experts to ensure their businesses are successful and profitable.

<https://www.nmba.info>

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