

THE VALUE OF ADVICE CAMPAIGN

MARKETING TOOLKIT



THE VALUE
OF ADVICE 

PURPOSE OF THE CAMPAIGN



In these tough times, your clients need every bit of help they can get in order to make the right decision when it comes to buying a home, getting a remortgage or essential advice on how to keep themselves protected. There's never been a better time to have that conversation with clients to help them on their journey.

At HLPartnership, we've put together a range of materials that your firm can utilise to really showcase the value of your advice and why your clients should choose to seek advice from your firm.

This is especially true for remortgages – with so many lenders these days reaching out to existing clients in the months leading towards the remortgage, there's a danger that they can miss out on the experienced advice that you have to offer.

Our materials and documents help give your firm a head-start on marketing to your clients, with downloadable pre-approved assets that you can use straight away, or as a useful basis to create something really bespoke for your clients.

We've also shared some of our best practice tips and hints for you to make the most of the opportunity ahead, so please do read through our guide and take advantage of the materials available to you.



WHAT'S THE MESSAGE?



The Value of Advice Campaign showcases your value as a mortgage & protection adviser.

Adopting digital marketing methods will allow you to speak to your target audience with greater accuracy, minimal wastage and in a cost-effective manner.

A connected approach across all marketing channels will enhance exposure as you move into the external communications phase of your activity.

You do not need to be a marketing whizz to ensure your website, social media, club emails, advertising and PR tell a corresponding story. Marketing begins with an understanding of who your audience is.

The messages you look to promote will be different for clients who are in different positions and stages of their life, so it's key to map out your target audience and think about the kinds of messages that will resonate well with them before undertaking marketing activity.



SOCIAL MEDIA MARKETING

Social media is becoming increasingly useful for mortgage & protection advice firms as a way of growing engagement with consumers, and helping to establish your firm's brand presence online as a means of being recognised as the go-to place for mortgage & protection advice for when the time comes that your audience is ready to engage.

Creating a social media presence that both projects your firm's values and engages your target audience need not be as intimidating as it may sound, and we have put together a range of tips to help along the journey.

1. BE CONSISTENT

Keep your posting regular and of a consistently high quality in captions, images and video. Tailor your posts by channel.

2. TAILOR YOUR POSTS

Instagram is all about inspirational images and videos, Twitter is great for reacting in the moment, whilst Facebook is great for both video and longer form storytelling, as well as fostering a community of engaged users to discuss and promote your business locally.

3. HOLD THE HARD SELL

Do not be compelled to feel like you are selling something or demanding consumers to sign up with you today – be fun, inspirational or educational first, and let your firm sell itself.

4. JOIN THE CONVERSATION

Positive responses to other conversations are a great way to increase engagement. It won't be central to your strategy, but don't be afraid to get conversational.



5. TAKE INSPIRATION

The best ideas are rarely new, so pay close attention to what other clubs or organisations you look up to in other sectors are doing for inspiration.

6. LINK ACROSS PLATFORMS

If one social channel is most successful, use it to draw attention to others. Always link to stories or new info posted on your website to drive traffic there.

7. REVIEW WHAT WORKS

Gauge your success on interactions and determine through trial and error which times, content strands and types of content work best for you.



WEBSITE AND EMAIL



Your website is your shop window. It doesn't need to tell the consumer everything, but it has to grab their attention. A well-functioning website is critical. The rule of thumb should be allowing the consumer to get in touch with you in no more than 6 or 7 'clicks'.

Make it easy for people to find information relevant to them, so consider creating different sections for key segments of your audience, such as First Time Buyers, those seeking to Remortgage and those looking specifically for detail on protection insurances. Think about the kind of information that your respective audiences may be seeking, and tailor each page to give them what they're looking for.

HARMONISE YOUR WEBSITE AND SOCIAL MEDIA MARKETING

Create a 'News' or 'Blog' page on your website, and use this to share stories that you believe will be of interest to your clients and consumers. Share relevant news and information about your business, things going on in the marketplace or some of our articles on the HLP Partnership Business Booster. You may also wish to share news articles or stories written by others, which is fine to do from an HLP Compliance perspective, as long as you cite the original author or source correctly.

By placing fresh content onto your website, this not only gives something new for web readers to find, but you can share this across social media, giving ready-made content that can be copied into a Facebook post for example, with a link back to your website.

TOP TIP

Across the HLP Business Booster we have examples of content that you can re-use on your website, and subsequently share on social media. Take a look through and see what will resonate best with your audience. When using pre approved materials please refer to their terms of use on each individual item.



SIMPLY EMAIL:



financialpromotions
@hlpartnership.co.uk



EMAIL MARKETING

Email channels can be a crowded area for promoting your business – it's likely that your clients and potential customers will already be bombarded by a myriad of different marketing emails from other firms, so getting your business to stand out is key.

Resist the urge to include lots of information and instead send emails focussing on the most important topics that will be of relevance to your target audience. Make sure to include a strong call to action, ideally leading clients to click through to your website, and pay special attention to using strong imagery to ensure the email stands out.

The email subject line is the most important part – it can be the difference between an unread and deleted email vs helping out a new client, so do spend time creating something interesting, unusual and tailored to your audience to pique their interest.

Your email marketing is only as strong as your database, so do everything you can to encourage your clients and potential clients to opt in to email communications.

It pays to keep monitoring the results – email programmes such as Mailchimp and Sendinblue will give you data on the performance of emails you send, you can monitor which emails get the highest open rates and those that are turning clients off and leading to unsubscribes. Be prepared to react to the data and develop continuous learning to ensure your emails are the most effective they can be for your clients.



ADVERTISING & PUBLIC RELATIONS



ADVERTISING YOUR FIRM

Whether we are talking social media advertising, local newspapers or national magazines, the simple rule of advertising is 'Return on Investment'. You must consider what your end goal is and the amount of expenditure required to calculate whether the project is worthwhile proceeding.

Sometimes, it can be straightforward to calculate a return-on-investment, for example, running paid banner advertisements online to grow the number of consumers visiting your website or following your page on social media. The data can be monitored and results learned quickly.

In other cases, the value of advertising expenditure is more complex to measure – such as the cost of producing flyers to promote your advice business in an estate agent, or sponsoring a local event to grow the brand awareness in the local community. These kinds of activities may not result in an instant flow of new clients, but over the longer term may help to grow the volume of leads.

It's not always easy to calculate the precise return on investment, so it can be worthwhile running a few 'test & learn' activities, spending just a small amount of money to trial an idea to see if it can help, evaluating over time, and moving forward with those where you can detect a benefit to your firm.

PUBLIC RELATIONS (PR) AND COMMUNICATIONS

Your good work deserves attention! There is a perception that PR is something that only larger businesses need concern themselves with, but the reality is that it's important for firms of all sizes, and especially so in today's tough conditions in the mortgage & protection advice industry.

Communicate success stories, awards and client reviews, not only to your existing audience of clients and consumers, but also to any local newspapers, radio stations and publications within the local area. These are great good-news stories that will allow your brand to be seen in a positive light, helping to grow the number of people who'll remember your firm when it comes to them buying a home or seeking protection advice.

Social media works well in tandem with effective PR, on Facebook for example, by creating a profile page for your business with client reviews and case studies, you are creating a medium for clients to share their experiences with others, and generate positive feedback for your business. The power of a client recommending your firm to their own friends is never to be underestimated and highly effective when already paired with your own existing promotional activities.

Take an active part in local Facebook community groups to promote your business to those close by, who will value your local expertise in the area, and look to form alliances with local estate agency and other property-related services who can put in a good word about your business to their own clients when needed.

If you aspire to grow your business to a national level, it's always worth remembering the adage that to succeed nationally, you must succeed locally, in multiple places.

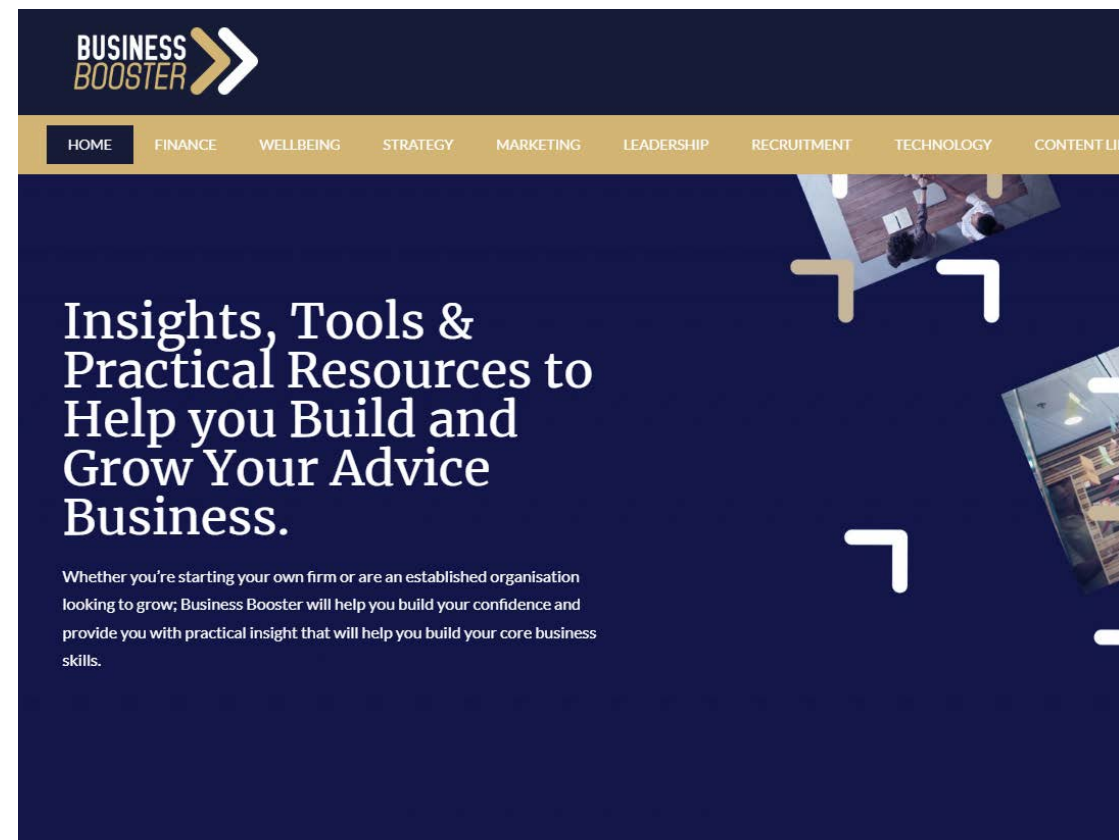


WHAT'S AVAILABLE ON THE HLPARTNERSHIP BUSINESS BOOSTER?

We've put together a range of content that you can use to promote your business, and form part of a cohesive campaign to outline the importance of clients seeking advice from mortgage & protection advisers before taking major life steps that can have massive consequences if the worst happens.

**Available from the HLP
Business Booster pages:**

www.hlpbusinessbooster.co.uk



SOCIAL MEDIA CONTENT

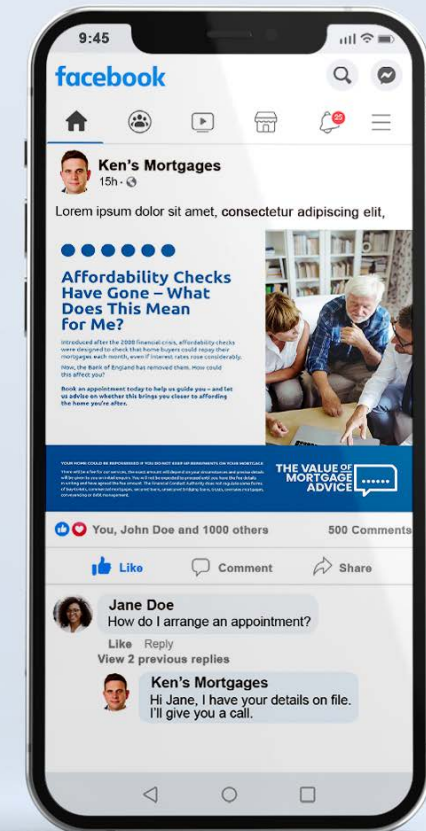
WHAT ARE THE POSTS FOR?

These posts have been put together with the idea of sharing on social media to increase consumer awareness about the value of seeking specialist advice on mortgage & protection from your adviser firm.

By growing awareness on the value of advice without pushing a deliberate sales message, consumers are prompted to think about seeking advice for when the time comes, and are likely to remember your brand being attached to this message.

HOW TO USE THE POSTS

These image files are ideal for sharing on social media platforms such as Facebook, simply download the ZIP file containing the posts from the HLP Business Booster page here and then you can upload online as an image, accompanied by some text with a link to your firm's website.



SOCIAL MEDIA POSTS



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What's the point of protection?

There's so many insurance plans around, how do you know if you're spending out on something you just don't need?

We're available to help talk through your exact circumstances and let you focus on protecting the things you value most. Our experts will share all the facts on Income protection, life assurance and critical illness cover, and help to provide a suitable recommendation based on your individual needs.

Talk to us today to find out more.

Availability and cost of cover is subject to criteria such as age, lifestyle, current health and medical history.



THE VALUE OF INSURANCE ADVICE

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Let us help you with the rising cost of living

Costs are going up and up. Are you on the right mortgage deal for your circumstances? Are you paying too much in insurances every month?

Our experts will work through your exact circumstances and help find the most suitable mortgage deals and protection packages for you. We'll help you focus on protecting the things you value most in life, and aim to find a mortgage that matches your current circumstances.

Book an appointment today to speak to one of our experts.



YOUR HOME COULD BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE.
The Financial Conduct Authority does not regulate some forms of buy-to-lets, commercial mortgages, secured loans, unsecured bridging loans, trusts, overseas mortgages, conveyancing or debt management.

THE VALUE OF MORTGAGE ADVICE

THE VALUE OF MORTGAGE ADVICE

We Have Access to a Range of Deals

We have access to a wide range of mortgage lenders and insurance providers, giving you the opportunity for a greater choice.



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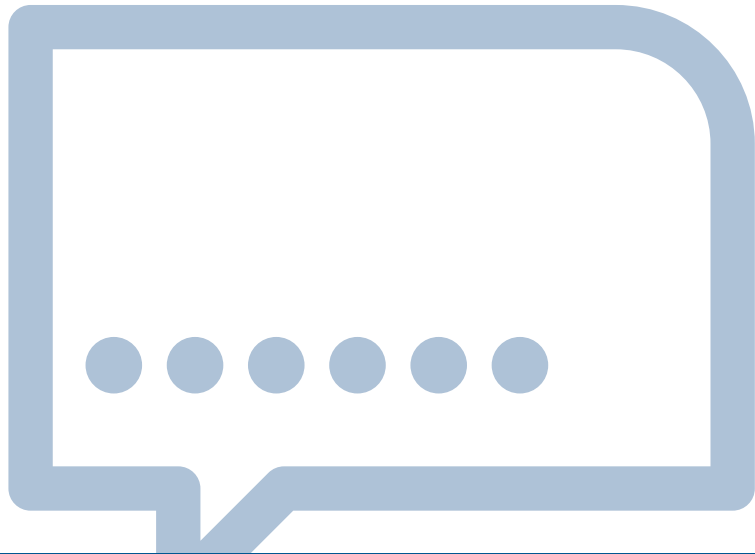
Posts also available in the following colours:



BLOG CONTENT

We have also hosted a range of longer blog articles on a variety of topics, for example, remortgages or buy-to-let property. You can download these articles and host on your website to give additional content for your clients to read.

Once uploaded to your firm's website, these can be further promoted on social media – try putting up a snippet of the article with a link to where you clients can find the whole article on your website. This will increase traffic to your website, and over time, may improve your website's ranking on search engines.



EMAIL CONTENT

We have put together wording specifically for an email communication too, on the value of seeking mortgage & protection advice. The email content touches on the weight of the decision to purchase a home or obtain a remortgage, to emphasise why it's important to seek advice. Furthermore, there is a protection message included too, offering clients some good reasons to get protected, and to help facilitate an effective discussion around protection.

HOW TO USE THE EMAIL CONTENT

Download the Word document containing the text template from the HLP Business Booster and copy the text into your firm's own client email platform of your choice, whether that's Mailchimp, Sendinblue or another provider.

You can increase the appeal of the email by including some effective imagery, ideally this will be something from your own collection that is in line with your brand's own look and feel. It is recommended to avoid any cheesy stock imagery, clients will look through this and it may unwittingly give an amateurish appearance to your communications.

Take time to locate powerful images that tell a story or provoke an emotive reaction to support the communication, and ensure that your firm has the licence to use these before sending out the email to your clients.

The wording supplied on the HLP Business Booster is pre-approved by Compliance. Before use, please ensure that you refer to the terms of use of each individual item.



THE VALUE OF ADVICE

