

How white-labelled guides can be used to enhance your Business

Introduction

There are many and varied benefits for any Financial Advisory Business that decides to use the promotion and availability of guides within their business. Especially if these guides are *branded*.

How you can benefit from using guides:

- They can be used to support and develop your brand identity
- And bring new ideas to your target audiences
- They can provide an educational aspect to your client relationship
- Or help with the development of your professional connections
- They can be used to market your brand, your business and your proposition

What do we mean by 'guides'?

Guides are short documents (normally between 8-12 pages) covering a financial subject/topic, providing an overview of the relevant subject. They are produced to **provide something of value to the reader**. This 'value aspect' will vary depending on the subject covered and the wider objective of the guide.

Guides can be **educational**, aiming to deliver an explanation of a financial subject helping the reader gain a better understanding of that subject.

An example of an educational guide would be one which provides a background and explanation of "How to Plan for Long Term Care Fees".

They can be **informational**, where there is information provided to the reader which enhances their knowledge of the subject covered. The information may introduce a new aspect around a well-covered subject.

An example would be within the pensions sector, an informational guide may cover "how to get better returns from invested money within a pension".

They can be **idea** or **concept** driven, introducing ways to get more from financial planning or how to view a subject in a new or different way.

An example would be a guide examining how successful professional investors approach investing.

Some guides may encompass more than one of these elements.

We may also provide you with the opportunity to use white-labelled **research documents**. These are not guides as such but syndicated research which you can use to help your clients, prospects or contacts with valuable market information.

An example of a research document would be one assessing failing funds offered by Banks.

Why Guides work

Whichever type of guide is used, they work because they allow you *to communicate with your client* in a very *low key fashion*, producing something of value they can benefit from; in a way which is easy for you to deliver and - for the recipient - easy for them to receive and use.

Many of the largest companies in the Financial Services sector (for example Fidelity, Hargreaves Lansdown, St James Place and Fisher) consistently use guides and have done so over many years as a bedrock of their marketing and client communication strategies.

They use guides to obtain new clients, but also to keep their relationship strong with **existing clients and to develop extra business from existing clients**.

Guides can 'double up' as a way of keeping your brand in front of your client as well as giving them valuable insight into a subject which may encourage **fresh action or activity**.

Financial Services is relatively unique in that financial advisers will benefit from having a wide ranging relationship with their client, covering many different areas.

A financial adviser will want to work with their client across their investments, pensions, life assurance requirements, their personal and business finances, if appropriate.

Guides can be used to introduce new ideas to a client or to widen the areas that the adviser works with their client.

For example many clients may also be in business, an adviser may want to send a guide on auto-enrolment to their personal clients who they know run a business.

Isn't the web the new way of doing all this?

The internet is the key communication tool for most businesses, however the content of a web site is just one way of positioning your Business, explaining more about what you do and where you are, your proposition and your key benefits. A guide allows you to provide a focus on a key subject matter and to hone in on a focused area.

Guides can be placed on a web site **with a download option**, helping to make the web site more '*content heavy*' - without taking up a large number of web pages.

The internet isn't just about web pages; you may well use the internet to run a Twitter Account or a Facebook page. A guide can be promoted and made available across one or both of these.

Although the internet is the most efficient way of creating a strong message, this is not in competition with using guides, the two go hand in hand.

How you can **specifically** use the guides

As described above guides can be used in a number of ways, you may choose one or more to produce benefit for your business.

- The guides can be used as PDFs and you can send them attached to an email to existing clients.
- You can create an email marketing campaign and send the guide or the availability of a guide to your database/prospect list.
- You may have accountants or solicitors you are looking to build introductory relationships with or enhance an existing relationship. You can send the guide to them with a covering email, encouraging them to focus on the subject covered, so that they can think of clients who may be affected.
- You can place the guide on your web site, boosting the content available across your site, you may wish to make the guide available for download 'on demand' or 'by order'. On demand means that the viewer can simply download it from the site; by order means you collect their name and details (for example their email address) and send it to them thereafter.
- You can get the guides printed and place them in your reception or hand them to clients at meetings.
- You can use the printed version of the guides to hand out at presentations or seminars. You could post them to selected clients and contacts.

Or, of course, you can use a guide in **all** of these ways.

Why Branding is Important

When we produce the guides we try hard to place an emphasis on the content, to create a balance between an easy-to-read document with one that covers the subject in a comprehensive way, so that it meets the target of being educational and informational.

The content is always important.

However the title is also crucial because the guide will often be used as a marketing tool. The title has to be capable of attracting the potential reader's attention.

The title and the content can also be supplemented by the branding applied.

The branding provides a subtle aspect to the communication. Whatever the title or the content, the branding applied to the guide is going to place your name or your company name in front of your key target audience. This does more than one thing: at a simplistic level it keeps your name in front of your reader, it allows your wider messages to be incorporated and it allows for your name to be associated with the content.

The advisory sector within the Financial Services Industry has not, historically, been strong on branding, however it appears this is now changing and more and more businesses – of all sizes – are focusing on the value of creating a brand identity and a message attached.

With the rapid development of Twitter, Facebook and Linked In as major communication channels and tools, getting a brand identity together, even for individual advisers, can be a critical differentiator.

The branding on the guides, in your brand with your identity attached, supports this.