



How to Market with Dignity

Growth can be gradual. Growth can be exponential. And growth can be explosive.

Marketing is often described as a “necessary evil.” You know that you need to reach beyond your circle of influence to capture new business, but it’s not what you enjoy about being an advisor. You enjoy the expertise that you’ve forged after years in the business. You like developing rapport with clients and tackling the unique challenges that any given client might bring. Marketing just doesn’t give you that same satisfaction.

If we’re being honest, a lot of marketing tactics feel downright sleazy.

Mass mailers. Off-shoring blanket cold calling. Internet “squeeze” pages. Diving deep into the marketing world can start to feel like you are moving farther and farther away from what makes you, well, you. You feel that clients respect you for your professionalism and your candor. You don’t want to tarnish that with a cheesy marketing campaign.

Put in terms that might ring even true for advisors, you value dignity. You talk to your clients about their dignity and how planning for their future helps them keep it. In those hard conversations about planning for retirement and long-term care insurance and how clients

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want their finances managed when they do reach that end point in their life, you are ultimately talking about dignity and how to protect it. An advisor’s job is to provide that guidance, and serving as that expert means running your business in a way that reflects the seriousness of the work.

As a result, advisors shy away from opportunities to grow their business because they fear that they might have to sacrifice their dignity if they take an aggressive approach to creating explosive growth in their business. This fear is reasonable, but it is possible to market your business with dignity if you approach the process with the right mindset and the right plan.

Staying on Brand

For every injury attorney that flashes a check with a scrolling number and throws out a tagline in his commercial, there is one that instead uses airtime to talk about community causes and his client’s stories. Where one rehashes the bare minimum for a commercial, the other accepts that building relationships can take time and chooses instead to highlight his connection to the people he serves.

It's the same tactic executed with very different approaches. One drips with marketing sleaze while the other is sincere and reflects positively on the brand behind it.

Virtually every marketing vehicle available to you can be executed with the kind of style and dignity that matches you and your business. The reason you see a lot of bad marketing is because good marketing is frankly hard to do. It takes time. It takes work. And sometimes it takes a great investment to achieve the quality that takes the experience your clients have with you in person and extends it to your marketing. When you do this successfully, a prospect who enters your business through this marketing will have a seamless experience with your brand from first impression all the way through years of service.

In our space, as an appointment setting firm, this is the first conversation that we often have with clients. Most advisors have had brushes with cold calling in the past, and by and large most of those experiences are probably negative. Phone calls from off-shore sales associates turnoff prospects. An untrained sales associate, regardless of the language they speak, doesn't speak with the poise and professionalism that you want to be known for.

So you don't cold call, and you don't work with appointment setters because you're worried about losing that dignity.

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Here's how we tackled that challenge:

- We use an extensive storyboarding process to capture an advisor's story for our sales associates to use when they call
- We train our advisors to speak as if they were sitting in your office, representing your business the way you want to be represented
- We evaluate set appointments, asking advisors to rate how well they fit the target audience so that we can consistently bring in high value prospects that meet an advisor's criteria
- We provide sales coaching to advisors so that they can expertly tackle the unique sales opportunity that a set appointment presents

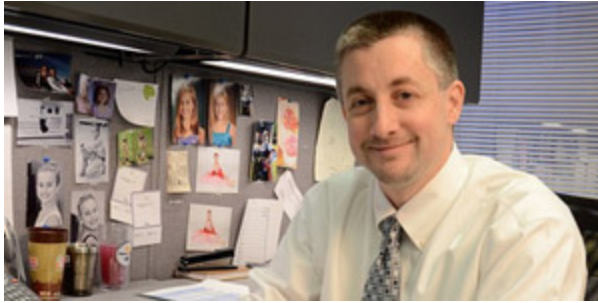
When the process is handled with thoughtfulness and care, the end result is a pipeline full of qualified prospects.

The Broader Picture of Your Marketing

You can take the lessons that we've learned from appointment setting and apply them to any of your marketing efforts, from your website to your drip campaigns. As you focus on sales and service, bring in experts that have the skill and the reputation to build marketing vehicles representative of your business. It might take more effort to reach the level of quality that you desire, but your brand will be better for it.

So rather than shy away from marketing for the sake of your dignity, use your standards to push your new business efforts to new heights.

About the Author



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About The PT Services Group



The PT Services Group is committed to helping you open the doors to new prospects and new business. While the methodology and expertise behind our appointment setting, business intelligence, and data collection programs are powerful tools, the secret to their effectiveness is the people using them. We are owned, operated, and staffed by professionals with expert knowledge of the financial services and insurance industries. Visit our website at www.ThePTServicesGroup.com to learn more.