

# How Defining Your Personal Brand Can Inspire Your Vision For Success



Advisory firm success is no longer just about balancing operational efficiencies, client experience initiatives, and growth strategies; now, more than ever, advisors need a well-defined value proposition.

## **What It Takes to Build Your Value Proposition**

I'm sure it's no surprise to advisors that this industry is both highly competitive and changing fast. Many firms are adapting their marketing strategies by building impressive websites, posting to their social media accounts, and curating communications to investors through online and digital channels. And these marketing channels are valuable, but the overall message is becoming redundant. Firms are all saying the exact same things about who they are via the exact same channels.

So what happens? Your brand message falls on deaf ears.

In order to stand out, you need to flip how you think about your branding and consider *what consumers want from you*.

## **A Look Into What Consumers Really Want**

The latest marketing research is showing us some pretty clear patterns when it comes to consumer expectations. The top three things they're looking for from brands include:

## Personalized Digital Experiences

**70%** of consumers love to see personalized ads while surfing the internet.

**70%** of consumers still want human interaction versus bots.

## Vulnerability & Transparency

**94%** of consumer said they were more likely to be loyal to a brand that offers transparency.

**73%** said they were willing to pay more for a product that provides complete transparency.

## Social Connection

**64%** of consumers want brands that use their power to help people.

**42%** of consumers want brands that act as leaders in society.



Sources: Sprout Social; Adlucent.com, Label Insight

Arguably one of the best ways to give consumers what they want is to give them a glimpse into who YOU are.

## Personal Branding 101

How many of you can confidently say that your firm currently shows your vision, values, experience, and personality as part of your branding? Some reading may be nodding their heads with a resounding “Yes” —and that’s amazing! You’re well on your way to making your vision a reality!

For those who see the gap or who are answering my question with uncertainty, remember that it doesn’t matter if you’re the face/owner of your firm or one of the valuable team members in a larger operation. You have the chance to define your own personal brand in light of how it fits in with your firm’s.

To shift your mindset in this direction, here are some things to ask yourself:

- *Who Is My Ideal Client?*
- *What Are My Gifts?*
- *What Experience Do I Bring to The Table?*
- *What Are My Values?*
- *What Are My Dreams for My Business?*
- *What Motivates Me In The Work That I Do?*

## The Makings Of An Impactful Personal Brand



Your Vision



+ How You Can Add Value



x How You Communicate That Value

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The Foundation To Your Marketing  
Program

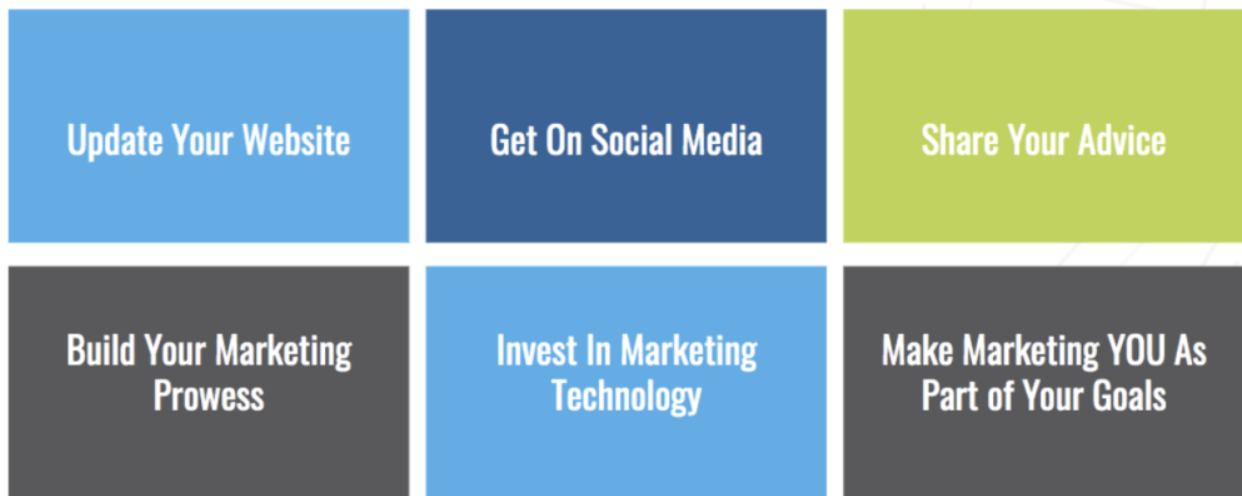


As you answer these questions and truly define who you are, how you want to run your firm, and what you want people to know about what makes you different, you'll be that much closer to defining a personal brand that is personalized, transparent, and socially connected.

### **So, You Know Who You Are; Now What?**

Once you have a more defined vision of who you are, you don't have to be a marketing expert to get started. Here are a few small ways to put yourself out there:

## Kick Start Marketing Your Personal Brand By:



By starting with a few key marketing fundamentals around defining your brand's unique vision & values, you can easily leverage your strengths to build a personal brand that will further your vision for success.

### **Looking for More Marketing Support?**

Orion Market\*r, our brand new automated marketing solution, allows advisors to better engage existing clients and prospects through a suite of customized marketing services to drive high-touch support and financial planning engagement. With this new service, advisors can further integrate planning practices with their existing client experience and win more business while helping their investors reach their short and long-term financial goals.

Learn more about the only advisor marketing platform designed specifically to drive your business's growth through financial planning. Join our webinar on Thursday, May 16 at 1 PM CT!

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