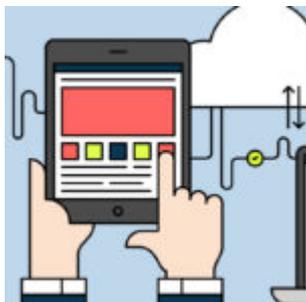


# How to Maximize Your Online Presence



With summer in full swing, many of us are vacationing – some of us exploring new places, others revisiting a favorite spot. If the allure of a particular destination draws you there multiple times a year, you may have considered buying a vacation home.

The sad reality is many people who buy a vacation property end up using it significantly less than they originally planned. But for the extra mortgage, taxes, fees and upkeep, it's a waste to only visit once or twice a year.

Many advisors do the same with their websites and online presence in general, but why build a website and neglect it?

In today's article, we'll go over a few quick tips on how you can use your technology to maximize your online presence and grow your business.

## Take your Firm Mobile

Where's the best place to start online? It's in your hands. A recent report stated 75 percent of internet traffic this year will be mobile. Additionally, Google revealed nearly 50 percent of people search exclusively via smartphone.

Next-gen clients expect a mobile-first approach – and it makes sense. We're constantly on the go, so successful firms need that mobile availability for clients and prospects to access them anytime, anywhere. By employing an app, such as the branded one Orion provides, you can provide on-the-go access for clients to review reports, receive updates, and access their accounts.

Beyond a mobile app, there are other ways to take your communication digital.

More and more companies are embracing text messages as a way of confirming appointments, sending reminders, and verifying accounts. One example of how this can work for advisors is sending out automatic text message updates for performance and portfolio values. Another is allowing clients to schedule meetings with you via text or online calendar links. (If you want to see how Orion can empower your firm with text updates, read more [here](#).)

You'll also want to make sure your website is responsive. This means the look and functionality of your website adapts based on the user's screen size. Don't sit back and let your app be the only mobile strategy. A responsive website ensures an optimal user experience. Have you ever pulled up a website on your phone only to discover it's not mobile responsive? Navigating it is often enough of a nightmare to make you leave the website altogether.

And lastly, your client portal should also be responsive so it works properly on phones and tablets.

Building on your client portal, don't forget about communication before someone becomes a client. By creating a prospect portal, you can give them a place to aggregate their assets and see a balance sheet of their total portfolio. This could also be a place to securely communicate with prospects to collect their financial information, like you do with your client portal.

## Across the Internet

No matter how digital we get, you still need that good old fashioned address and phone number. If you've moved or have multiple offices, make sure to update your location(s) in Google and other online business listings so that the right ones show up when people search for you.

Another way to increase your online visibility is to utilize social media. This is probably the most obvious solution, and it's easy to implement! Consider your audience when selecting which social accounts you'll create. For example, you are likely going to get far more traffic for your blog on LinkedIn than Pinterest.

And you certainly don't need to be on all the social media sites. Just pick the ones that are beneficial to you, and focus on posting quality content and interacting with followers frequently. Get your team involved by sharing company posts.

Encourage employees to share about work, or use social channels to communicate with peers, clients and prospects (as long as your compliance is okay with it, that is).

You'll also want to optimize your website for search. SEO, or search engine optimization, is the process of maximizing your website traffic by ensuring it appears high on the list of results returned by a search engine.

First, look for keyword opportunities. Think about what your clients and prospects are searching, and try to use those search words throughout your site. Aim for more specific keywords, rather than general. For example, you'll have better odds coming up in search results with the keyword "Portland Oregon financial advisor" than you will with just "financial advisor."

Second, if your website is image heavy with little text, this is bad for SEO. Search engine "bots" can't read images, so make sure you don't rely too heavily on infographics and images. Create webpages with plenty of search-friendly, written content.

Finally, make sure you're creating "evergreen" content. That is content that stays relevant, because it's not time-sensitive. Content with a longer shelf-life is more likely to achieve high search rankings over time. Which brings us to the next point...

## **Sharing Original Content: Beyond Blogs**

Sharing original content is not only a must for SEO, it's also a great way to build trust as a respected resource in wealth management. Here are some examples of content you can create, amplifying your online presence:

### **Press releases**

Did you add a team member? Cross an AUM Threshold? Contribute to a local charity auction? Share your wins with a press release to build local notoriety.

### **Blogs**

Sharing your original thoughts and expertise can help create awareness, establish you as an authority in your field, and give prospects a better feel for how you'll

work with them.

## **Videos**

Because humans are visual creatures, video is great way to communicate. With Orion's Engage, you can create personalized video updates that share custom information with each client.

## **Ebooks**

Give old blog posts new life and create a valuable resource for new prospects by compiling a series of posts into a single-topic ebook. Then, offer the resource on your website in exchange for an email (yes, it really is that easy).

## **Worksheets**

The idea behind sharing content is to create value for your audience. What does that look like? Try creating a tax planning worksheet or an editable balance sheet to help prospects do a little of their own homework.

## **Financial calculators**

Same idea here. Help DIYers and prospects out with a financial calculator - an interactive tool you can add to any web page.

A vacation home doesn't do you much good if it sits unused - in fact, it can end up being more of a burden. Your online presence is the same way. If it's not working for you, it's working against you. By taking advantage of the tools and technology available to you, like those provided by Orion, you'll get your website to work wonders for you and your firm.

## **Looking for more web tips? Download our ebook on Advisor Marketing in the Digital Era**

*0267-OAS-7/24/2017*