



FIND YOUR VOICE

A CONVERSATION WITH MIKE WHITE

> Mike White is chief marketing officer at Raymond James. He is responsible for directing marketing strategy, brand management, corporate communications and the in-house agency.

> WHAT MAKES YOUR DEPARTMENT SO UNIQUE?

We are built like a full-service advertising agency within the firm and staffed with nearly 150 marketing professionals dedicated to the philosophy that the advisor is our client. We work with thousands of advisors each year, but recognize that each practice has a unique story. We view these stories as the foundation from which we collaborate with them to develop and articulate their brand.

> YOU ALSO BRAND FOR THE ADVISOR?

Yes. We believe that if we can help advisors better manage and build their brand – help them clearly articulate their value proposition and consistently express their values, personality, commitment to the community, etc. – they will get more referrals, have better success with networking, and strengthen relationships with clients and centers of influence. It's all part of an integrated marketing plan that includes logo designs, various forms of collateral and a digital presence.

Every advisor has different marketing needs, but virtually all of them need to consider how they are managing their “digital footprint.” Because over 90% of clients who are referred start their due diligence with a Google search, we always start by asking an advisor what shows up when someone Googles him or her. While success will depend in part on factors such as name and location, advisors should work to own the top half of a search return for their name with links to a branded website and a thoughtful set of social properties that tells the advisor’s story and validates the referrer that got the potential client there in the first place.

> SOCIAL PROPERTIES?

I’m talking about a carefully crafted LinkedIn profile that provides a summary of the advisor’s

credentials; a team or practice Facebook account to reflect the advisor’s values, commitment to the community and personality; as well as an active Twitter presence to demonstrate subject matter expertise important to the advisor’s clients. All these, tied together with a customized website that spells out a compelling value proposition and is designed to be optimized for search engine results, should help convert more referrals into in-person meetings.

> LET’S SAY I’M AN ADVISOR A BIT LATE TO SOCIAL MEDIA. HOW SHOULD I GET STARTED?

I think it’s important to treat this like any other marketing or communications activity. Be clear about your communication objectives. Then think about what your practice stands for and how you’d want your clients and centers of influence to speak about your team to potential clients. With that in mind, you should then develop mini-plans for each social platform you intend to use, understanding who you are trying to reach and what your communications will say about your brand and your value proposition. Having an editorial calendar to ensure you cover certain topics on a regular basis can keep you on track (e.g., you might plan to post something related to a local charity your practice supports once a month to reflect your values). Finally, working with a marketing agency that’s familiar with the regulations associated with the financial industry can help ensure you remain compliant, leverage available best practices, and effectively build your brand online and otherwise.

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