



Checklist #3 : Adviser directories

This checklist is broken down into three sections; tasks which apply equally to both directories, followed by those which are only applicable to Unbiased or VouchedFor.

1

Upgrade from free

The profiles of advisers with a paid for subscription are ranked higher in the search results than those who have a free profile. To get real value from either directory, advisers need to take a paid subscription; which one depends on your budget and requirements.

Unbiased: Once you have upgraded your profile and fully completed it you will start appearing in search results.

VouchedFor: As you won't appear immediately in the search results without reviews, but will pay the monthly fee, we recommend initially taking a free listing from VouchedFor, building up your reviews, and activating the paid for subscription when you have 15 - 20.

Done



To do



Not for us



2

Fully complete your profile

Far too many profiles are only partially completed.

There's a direct link between the completeness of a profile and the number of enquiries you can expect to receive. Therefore, as basic as it sounds, make sure yours is fully completed.

Done



To do



Not for us



3

Allocate time

To use either directory effectively you must be committed, allocating sufficient time to work on your profile. Set aside an hour each month to analyse the results you are getting, any changes your competitors have made and amend your profile as necessary.

Done



To do



Not for us



4

Check out your competitors

Recreate the online journey consumers will take. Enter a series of postcodes local to you into the directories and look at the search results.

How does your listing look? Does it stand out? Is your target client likely to click on your profile or one of your competitors?

Done



To do



Not for us



Stand out

The results page displays only a limited amount of information about each adviser or firm. Consequently, there are only so many things you can do to influence the consumer's decision whether to click your profile. Nevertheless, your page must stand out from the competition, which means:

For Unbiased

- Using a photo of you or your team instead of a logo
- Alternatively, display your company logo alongside your photo
- Complete the brief, 20-word description. Don't waste words, be specific, mention the problems you solve, and be irresistible
- Add special offers, this makes your advert larger and shows you are prepared to invest in the financial well-being of your clients early in the relationship
- Improve your Response Rating by dealing with enquiries within the prescribed timescale

For VouchedFor

- This is a directory of advisers and not businesses. The picture must, therefore, be of you
- Above all else though, improve the number and quality of reviews you have received. Focus on both quality and quantity; many of the average scores are relatively close, therefore faced with two advisers with, for example, average scores of 4.8 / 5, the consumer is more likely to click the one who has more reviews as this probably indicates greater consistency



5

Use high-quality images

Photos are a crucial differentiator. We recommend investing in a set of professionally taken images of you and your team; passport style pictures, or 'selfies' taken on a mobile phone look amateurish.



6

Show off

If you have won awards, or have the Chartered or Certified Accreditation, experiment with overlaying these on your profile picture or mention them in your profile text.

This will confirm your expertise, set you apart from other advisers in the search results, and increase the likelihood of a consumer viewing your profile and making an enquiry.



7

Be specific

Be specific about the types of clients you specialise in dealing with. If you are an 'at retirement' specialist, then don't be afraid to say so. Consumers would rather deal with a specialist than a jack of all trades.

Being specific will make it easier to demonstrate your expertise in your professional niche, giving the consumer peace of mind that you are the right adviser for them. It will also cut down on the calls and enquiries from consumers outside of your target audience, which of course will save you money.



8

9

Avoid jargon and products

Visitors to your profile might not know what ‘passive investing’, ‘cashflow modelling’ or ‘decumulation’ means, and frankly they probably don’t care. Nor do they want to see a list of products: “We deal with ISAs, Pensions, Mortgages...”.

They want to know whether you have the expertise to solve their financial problems; nothing more, nothing less.

Your profile should show empathy and be written in plain English. Using a friendly but professional tone. Be accurate; poor punctuation and grammar will turn off potential clients.

Done	<input type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

10

Online consistency

Before getting in touch, a consumer may do additional research; probably starting with a Google search and a visit to your website. It’s vital that the impression the consumer has built up from your directory profile is reinforced by what they find elsewhere online.

For example, if your directory profile discusses your specialism in ‘at retirement’ advice, your website should expand on this with case studies, explaining more about the problems you solve and displaying testimonials.

Consistent messaging across your entire online presence is reassuring and confirms to the consumer that you have the specialist knowledge to solve their problems.

Done	<input type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

11

Develop a process so you can respond to enquiries quickly

The quicker you respond to an enquiry, the better an impression you will create. We recommend implementing a simple process to ensure the enquiry is called quickly:

1. If possible, stop what you are doing and pick up the phone; receiving a timely call, from their adviser of choice, will create a great first impression
2. If you are unavailable, another member of your team should put in a holding call, to explain you are in a meeting and will be in touch shortly. This call could even be used to gather some details about the needs of the enquirer, making the conversation you eventually have more meaningful
3. Out of normal office hours? Try to send a holding email, which can be templated / drafted in advance, acknowledging the enquiry and confirming when you will call. You could even go a step further in this email and suggest an immediate conversation; that would certainly set you apart from the competition

Finally, if you know you will be unable to call enquiries for a period of time, perhaps because of holiday or illness, then pause your profile; there’s no point paying for enquiries you can’t attend to.

Done	<input type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

12

Monitor conversion rates

All this effort is only worth it if you improve the results you are getting. Build a baseline by analysing your conversion rates over the past six months. Work on your profiles then compare the subsequent conversion rate to understand whether your efforts are resulting in an improvement.

If they are, great! If not, keep tweaking your profile until you see an improvement.

Done	<input checked="" type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

Unbiased only

1

Maintain your Response Rating

Like it or not, the Response Rating will be a factor in a consumer's decision whether to select you. Therefore, all enquiries should be accepted or declined within the allocated period. Focus particularly on those you need to decline, as these often slip through the net. During busy times, or when you are unavailable, pause your profile so that enquiries aren't missed.

Done	<input checked="" type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

2

Improve your chances of winning 'Concierge' enquiries

To win 'Concierge' enquiries you need to be quick off the mark. Every second counts and there are several things you can do to help:

1. Make sure enquiry emails come through to your phone as well as your main computer
2. Consider having the enquiries sent through to a generic email address, monitored by more than one person, improving the chances of the email being read and responded to quickly
3. Ensure your computer remembers your Unbiased password. Vital time can be lost searching for the login credentials. LastPass, or similar, is invaluable here
4. Preload your account with tokens

Done	<input checked="" type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

3

Make sure links work

The 'Plus' subscription allows advisers to include links to their website and social media profiles. This is useful, as it allows consumers to easily find out more about you. It also has the added potential benefit that the consumer may get in touch with you directly, rather than through Unbiased, which means you won't pay for the enquiry.

Make sure the links work, it's very easy to forget to update them if they change. A broken link will do nothing to improve your credibility.

Done	<input checked="" type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

4

Add multiple testimonials

Few things are as powerful as testimonials, especially where they show visitors you have solved problems like those they are experiencing. Testimonials should ideally be 100 – 150 words long, explaining the problem the consumer had, what you advised (in very broad terms) and the benefits of this advice.

Done	<input checked="" type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

Go free, then take a paid subscription

Getting reviewed is essential if VouchedFor is to work for you. We only suggest you take a paid for VouchedFor subscription when you have built up at least 15 – 20 reviews, which can be added with a free subscription.

1 The most efficient way of building reviews is to use the tools provided by VouchedFor, including a very simple and effective mail merge facility.

These can then be used elsewhere, for example on your own website. Using VouchedFor as a central hub for collecting reviews and testimonials, which you then use elsewhere, means you will only ever ask clients to visit one place and not be pestering them for multiple testimonials.

Done

To do

Not for us

Use the VouchedFor widget on your website

Not everyone who visits your website will know you have great client reviews on VouchedFor; you want as many people as possible to know how highly rated you are.

2 We recommend using the widget created by VouchedFor, this allows you to display a graphic on your website showing your rating.

Done

To do

Not for us

Keep adding reviews

Collecting VouchedFor reviews is an ongoing task, ideally embedded within your internal processes so that a new client is always asked to leave a review.

3 There are now advisers on VouchedFor with over 100 reviews; that shows a high degree of consistency, both in terms of advice (assuming the reviews are positive), but also in requesting reviews.

Done

To do

Not for us

Respond to reviews

The VouchedFor review system allows advisers to respond to reviews. Advisers generally use this facility to respond to the occasional piece of constructive criticism from clients; something we completely endorse. However, we recommend treating this like a social media platform and responding to positive feedback too. If a client says something complimentary about your service on Twitter, Facebook or LinkedIn you would respond. The same should be true with VouchedFor.

4

A “thank-you” goes a long way.

So would something longer, perhaps: “Thank you for your kind review, it has been my pleasure to advise you for the past 15 years and I’m grateful for the friends and family you have introduced to me.”

This shows you read the reviews, they are important to you and you are gracious enough to take the time to thank your client. Secondly, it shows this particular client has put their faith in you for over a decade. Finally, it demonstrates they have been so happy with your services that they have recommended you onto friends and family.

Done	<input checked="" type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

Give everyone a great experience

Everyone who makes an enquiry via VouchedFor can leave feedback, including on that crucial first interaction. These are known as ‘First impressions’ and aren’t always complementary, especially if the adviser was slow in making contact.

5

Even if you can’t help or the enquirer isn’t your ideal client, it’s vital you leave them with a positive impression. If you can’t help, then signpost to someone who can, suggest online articles they might like to read or websites they could look at.

Go the extra mile, leave all enquirers with a great impression and some will take time to review the interaction.

Done	<input checked="" type="checkbox"/>
To do	<input type="checkbox"/>
Not for us	<input type="checkbox"/>

How did you do?

If you’ve got more boxes ticked for ‘done’ than ‘need to do’ then congratulations. Your directory page will no doubt be a great place for your audience to be.

If you have the odd ‘need to do’ ticked that you’d like to talk about, then we’d be happy to help out. You can reach us by calling 0115 815 7770 or emailing hi@theyardstickagency.co.uk

☎ 0115 8965 300

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