YARDSTICK

CHECKLIST SERIES

Checklist #6 : Building your team pages

Our research shows that the team page on your website will be one of the five most popular. That's partly because many visitors will naturally gravitate there, as they will likely carry out due diligence on you, and your firm, before getting in touch.

It's therefore only sensible to spend time making sure it is as effective as possible. Of course, if you don't already have a team section on your website, or for sole adviser / planner practices a page explaining more about you, then it's time to build one.

1

Get the navigation right

Sole-adviser / planner practices: We recommend building a page for the adviser / planner containing the information we've outlined in this checklist.

We also recommend including information about any supporting members of the team, for example paraplanners and administrators, ideally linked to their own individual page.

Larger or multi-adviser / planner practices: We recommend a page showing all members of your team, linked to individual subpages.

We recommend this navigation structure for several reasons:

- Trying to cram all the relevant information about each adviser, planner or team member into one-page leads is impossible. The page would simply be too long.
- Search engines will welcome the extra, unique content
- Ultimately, the user experience will be enhanced by a well laid out team section

Done

To do

Not for us

2

The team page

Visitors to your team page might be simply browsing. Alternatively, they might be looking for a specific person or type of team member.

Make their life easy, give the name and job title of each person, on the team page. Overly engineered pages, with only the individual's photo but not their name or job title, are a mistake. How does the visitor know who to click? Why make their life hard?

Obviously, if you are a sole adviser / planner practice then this isn't an issue.

Done

To do

Not for us

3

Who to include

Some websites fall into the trap of only including advisers or planners on the team section.

We believe that's a mistake; it diminishes your support team's role, looks elitist and misses a golden opportunity for adding keyword-rich content onto your website. Remember, many of your support team will have client contact; it makes sense to have an individual page for each.

Done | To do | Not for us

4

Invest in a professional photographer

We always recommend that photos of you and your team are professionally shot and the temptation to save a few quid by taking them yourself is avoided. Why spend thousands on a new website and supporting marketing, only to be let down by the quality of the imagery? And, a good photographer will get the best out of even the most unwilling of subjects!

In answer to the question we are most commonly asked; dress as you would do to meet a client for the first time. Smile and try to relax too.

You might also consider a more informal shot, as a companion to the professional image. Done well, these can be very effective and are worth considering to add a touch of humour and personality to these pages.

Done | To do | Not for us

5

Consider illustrations as an alternative

We know some advisers and planners use illustrations or caricatures instead of traditional photos; examples of these can be found on our website by **clicking here**.

This can work well if you are on a budget as they can be sourced very cheaply. It is also a useful alternative if your team is expanding rapidly or you work from diverse locations and it's hard to get everyone in the same place at the same time.

A word of caution though. Illustration or caricatures won't appeal to everyone; they must be carefully chosen so to engage, not alienate, your visitor.

Done | To do | Not for us

6

Individual adviser / planner pages

We recommend including the following information, broadly in the order we've listed it, on each adviser / planner profile page:

a

Job titles

Give an accurate job title, which clearly describes what it is you do.

If you are an adviser / planner and a director or partner, then give both titles; simply describing yourself as a director or partner isn't particularly useful, especially if the visitor is looking for an adviser or planner.

Done | To do | Not for us

b

Contact details

Some people, perhaps existing clients, might simply visit an individual's page because they need contact details. Others might not yet be clients but want to get in touch. Either way, make your contact details easy to find.

We recommend including your office telephone number, email address and postal address. If you're happy to be contacted on your mobile, include that number too.

Email addresses should be clickable, as should telephone numbers from mobile devices.

Done

To do

Not for us

c

Social media links?

In addition to contact details, you might want to include links to your social media profiles.

We recommend caution though. Ideally social media should be used to send people to your website, not the other way around.

Done

To do

Not for us

d

Details of your expertise / specialisms

Niches are good; we all like to feel we are working with someone who is an expert in their field. It makes your marketing easier too.

Explain the type of clients you specialise in working with, as well as your areas of expertise.

Elsewhere on the site, we also recommend explaining the types of people you don't work with, or who your services aren't right for; that's not something we'd recommend including on the individual adviser / planner pages though.

Done

To do

Not for us

e

Chartered or Certified status

If you hold either of these two accreditations, make sure they are displayed prominently on your website along with an explanation of what they are, the investment of time and resources they took to achieve, and most importantly, the benefits to clients.

For more information on this, you can download our 'Promoting your Chartered status' checklist.

Done

To do

Not for us

Click here to view checklist.

f

Personal information

We do business with people we know, like and trust, which is why we recommend including some more personal information on the page.

Try and avoid the obvious clichés and if possible display the information in an innovative way. Lists work well, as do questions and answers. However you do it though, give something of yourself; people are interested.

Done

To do

Not for us

g

Include social proof

Other people saying how good you are at what you do will always be more powerful than you telling them.

You've got several options, including:

- Testimonials: These are still powerful if collected and displayed correctly. Our recent blog: '**Six tips to improve your testimonials**' will help you here. As will our email template which you can use to request testimonials directly from your clients.
- Video testimonials or case studies: These take more work to produce and the natural inclination of some advisers and planners is that clients won't agree to being filmed. However, you don't know until you ask; you might be pleasantly surprised.
- VouchedFor: Paying subscribers to the directory can embed a piece of code on their website which elegantly displays their VouchedFor rating and the reviews. It acts as a pop up on your site and doesn't take the visitor to VouchedFor, which is why we recommend including it.
- Awards: If the awards you have won are specific to you then these should be added here, along with a brief explanation of the award and, if appropriate, what you had to do to win it. Remember, not all awards are equal!

Done

To do

Not for us

Click here to view template.

h

Press coverage

Being quoted in the press is an excellent way of demonstrating your expertise and credibility, whilst differentiating you from your peers.

Include links out to the coverage, making sure they open in a separate browser window.

Done

To do

Not for us

hi@theyardstickagency.co.uk 0115 8965 300

i

Qualifications

Adding your qualifications to the page helps to demonstrate your areas of expertise and the fact you are willing to develop your skills and knowledge above the minimum required.

It's also a useful way of (naturally) working keywords in to your website.

We recommend adding a list of your qualifications to the foot of the page (perhaps hidden behind a reveal), including the full title (not just RO1, G10, AF3) and, crucially, an explanation of what the qualifications mean to your clients.

Done

To do

Not for us

j

Links to the FCA Register

At a time when financial fraud is big news, making it clear you are regulated by the FCA will help to reduce the anxiety levels in some prospects.

Links out of your website should be kept to a minimum. However, we always recommend including a link to your page on the FCA register, although make sure it opens in a new window too, so both your site and the FCA's are open at the same time.

Done

To do

Not for us

k

Display your Statement of Professional Standing

Every adviser has an SPS, but very few make theirs available to clients and explain why it is important.

We recommend you upload your SPS to your website and explain its significance to visitors.

In common with links to the FCA register, doing so will set you apart from other advisers and potentially reduce anxiety in some visitors. Just remember to keep it up to date!

Done

To do

Not for us

7

Support team pages

We recommend adding an individual page for every member of your support team.

The pages should ideally include:

- Information about their role
- Contact details (assuming you are happy for them to be contacted)
- Personal information
- Press coverage and awards
- Qualifications

We also suggest trying to gather testimonials for your support team and including them on the page too, especially those who are client facing.

Done

To do

Not for us

8

Get the design right

The design of any website page is important. However, given the amount of information on these pages it's worth going that extra mile to ensure they are elegantly presented and information is easy to find.

We recommend the use of different colours, buckets, icons, lists and bullet points to break up the pages.

If you would like to see examples of team sections we have created, please drop us a line to **hi@theyardstickagency.co.uk**

Done

To do

Not for us

How did you do?

As many visitors will be carrying out some basic due diligence before deciding whether you are potentially the right adviser for them, and then getting in touch, your team page will almost certainly be one of the most popular on the website.

It therefore makes sense to spend some time building detailed and effective profiles.

How does your current website rate? Was it a pass? Or have you flagged a few things you need to review?

If you've got more boxes ticked for 'done' than 'to do' then congratulations, this section of your website is definitely on the right track.

If you have the odd '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

hi@theyardstickagency.co.uk

www.theyardstickagency.co.uk

The Yardstick Agency,
3rd Floor,
3-7 Middle Pavement
Nottingham, NG1 7DX

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