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YARDSTICK

35 tips to improve your website

An essential guide for advisers

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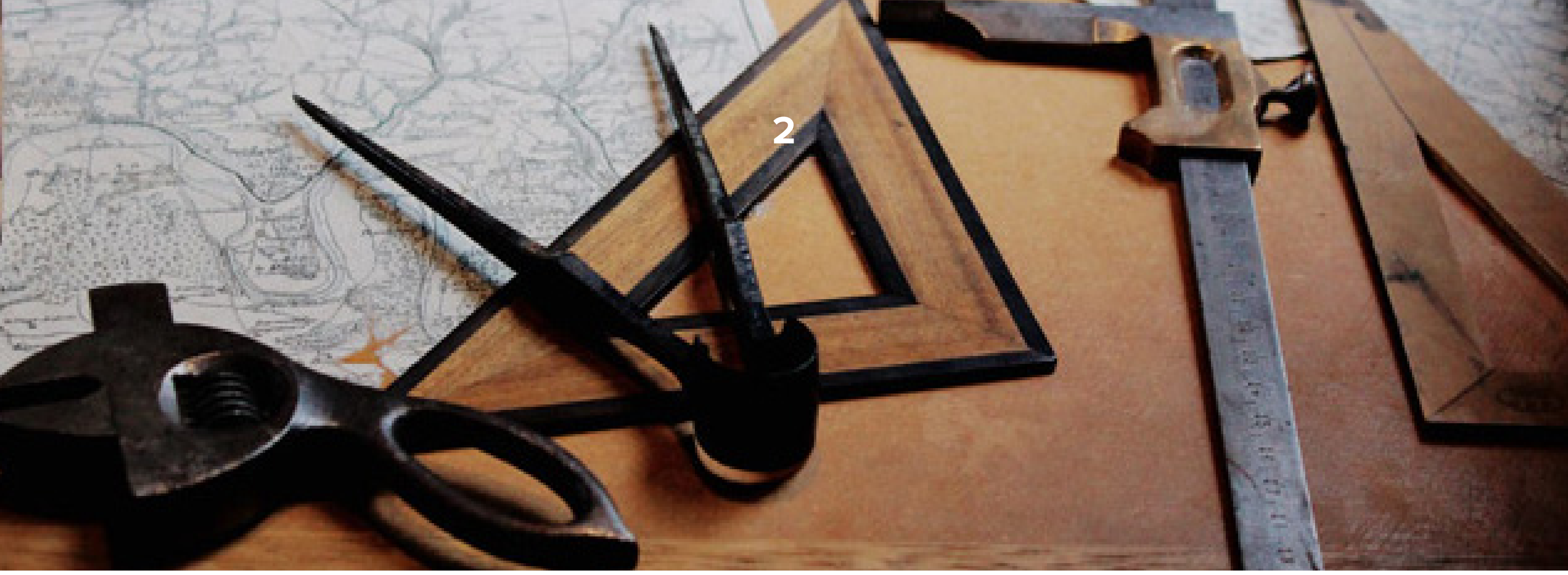

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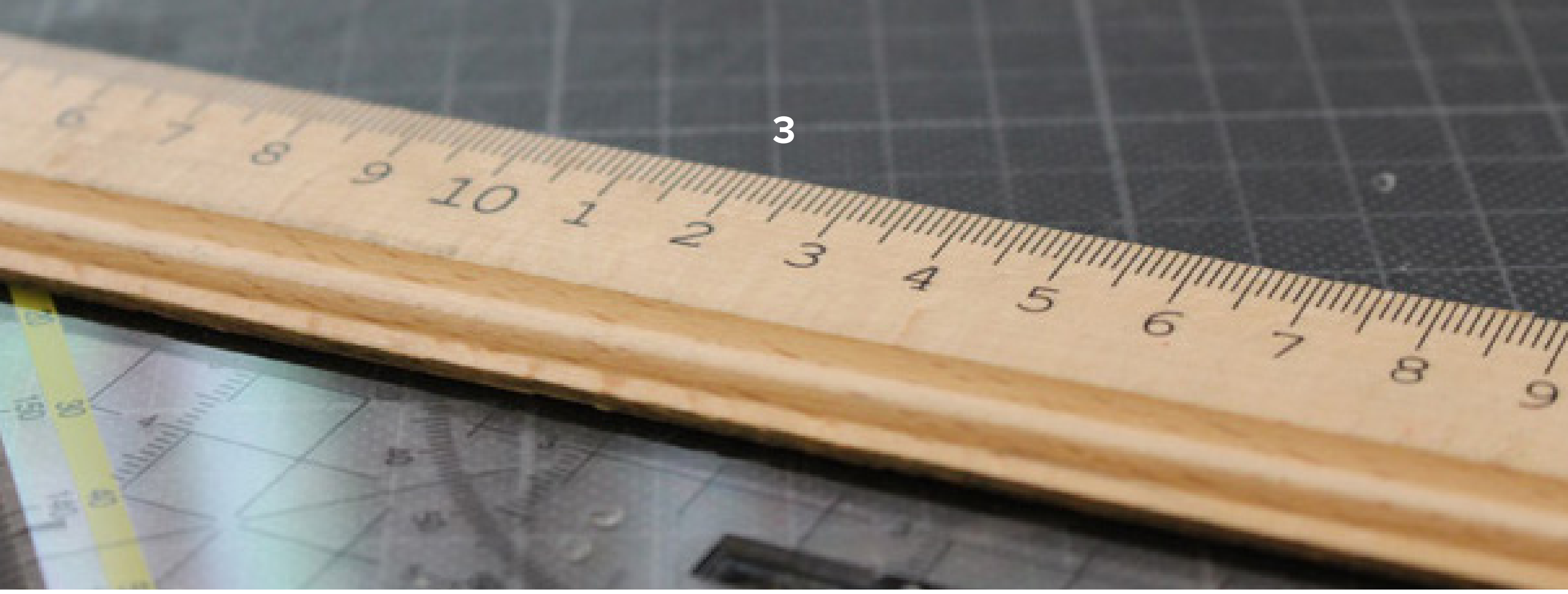


Introduction

Almost every advisory business I know has a website. But in my experience, the quality and effectiveness varies tremendously. There are several reasons for this, not least a lack of time. However, we believe that every advisory business benefits from an effective website.

Why?

Well, that's different depending on the type of visitor.

Referrals & recommendations:

A website gives people who have been referred to you, perhaps by an existing client or professional connection, the opportunity to 'check you out' before getting in touch. If your website reinforces the initial favourable impression given by the person who referred you on, they are more likely to get in touch. But, if your website is ineffective and fails to deliver, you may never get that call and lose a potentially valuable new client. Your website therefore plays a pivotal role in improving the number of recommendations who actually get in touch.

Other website visitors:

Your website will improve the effectiveness of other marketing you undertake. For example, potential clients who find you on VouchedFor, Unbiased, may want to do more research before they finally get in touch. The natural next step is for the potential client to search for you online and then spend some time on your website 'checking you out'.

Again, if your website continues to build a positive impression, the chances of the visitor getting in touch increases. The reverse is of course equally true.

Existing clients:

For existing clients a website provides a degree of reassurance, especially if you are setting up a new business and asking those clients to follow you. It's also an excellent way of communicating useful information to them and of course, a great website makes referring your services to their friends and family, so much easier.

Why have we produced this guide?

Our mission is to help advisers and planners market their businesses more effectively. This guide is part of a series, intended to do just that. It's also a great way of us practising what we preach too; giving away for free valuable,

How should I use this guide?

The tips contained in the guide work equally well for existing websites, as well as sites currently being developed. We would suggest using the guide as a checklist; simply work your way through it and tick off the tasks you complete. Of course, some of the tips may not be appropriate for your business. There may be some ideas you feel are just not for you; in which case simply mark these appropriately and move on.

Phil Bray
Founder and Director
The Yardstick Agency

1

A winning formula

In terms of generating new client enquiries there's a formula for success, which most of the tips in this guide attempt to deliver.

The formula?

Reduce anxiety + demonstrate expertise + effective calls to action

Allow us to explain:

Almost everyone who visits your site will have a financial problem or challenge they want to solve. Your website needs to convince the visitor you are the person to do this.

Every visitor will have anxieties, which will vary from person to person. An elderly widow or widower looking for advice might be concerned about financial scams. Conversely, a confident company director may be worried about the process of taking financial advice, distracting him or her from their business. Every visitor wants to be convinced that you have the necessary knowledge, expertise and experience to solve their financial problems.

Successfully reduce the visitor's anxiety and prove your expertise, whilst making your calls to action easy to take, and your website will be truly effective.

Done

To do

Not for us

> "Every visitor wants to be convinced that you have the necessary knowledge, expertise and experience to solve their financial problems."

Google Analytics

Google Analytics is your friend, helping you to make informed decisions about your site. The great news is, it's free. In our experience, most advisers haven't added it to their site and even those who have look at the information it provides infrequently.

Google Analytics gives you access to a huge amount of detailed information, including:

- Visitor numbers, how many people visit your site and how often? The source of visitors, how do they find your site?
- Which websites refer people to yours?
- Which social media channels are most effective at directing traffic to your site?
- Visitor behaviour, what pages do they look at? How long do they spend on each page?
- Devices, are visitors using their desktop, mobile or tablet to view your site?
- Do their behaviours change depending on the device used?

We believe that changes to your website should be evidenced based. Google Analytics provides you with that evidence. We'd recommend adding Google Analytics to your website and analysing the data it produces to find out what's working and what isn't. This information will help you prioritise the changes you will make.

2

Done

To do

Not for us

> Design is crucial too, four in 10 people will stop engaging with a website if the layout is unattractive.

3

Be mobile friendly

Our research shows that 30% of visits to adviser websites are made via a mobile or tablet. The percentage is rising too, particularly for mobile.

There's two reasons why your site needs to be mobile friendly:

1. To improve the user experience. In other words, to make it easy for visitors to navigate around the site, read the content and, of course, take your calls to action. Visitors are five times more likely to leave your site if it isn't easy to use. Mobile viewers are here to stay, you need to make their experience on your site a good one, if you don't, someone else will
2. You need to keep Google happy too. The king of search engines is putting ever greater emphasis on the mobile friendliness of your site when deciding where to rank it. To put it another way, if your site isn't mobile friendly, Google will push you down the search results, which of course will impact visitor numbers

First things first, you need to know how mobile friendly your site is; this handy tool from Google will do the job for you:

https://testmysite.thinkwithgoogle.com/

Next, take appropriate action based on the results the tool displays.

Done

To do

Not for us

4

A simple navigation

Research shows that after finding your site from an online search, 50% of visitors will immediately use the navigation menu to orient themselves. It's crucial visitors can easily find their way around your site and find the information they need.

The phrase 'less is more' has never been better used than when it comes to website navigation. You need to show people where to go simply and quickly.

Design is crucial too, four in 10 people will stop engaging with a website if the layout is unattractive.

Simple, clean and logical are the key words here.

Done

To do

Not for us

5

Get your calls to action right

An effective website will make it easy for visitors to take your calls to action.

Most advisers want potential clients to pick up the phone and talk to them. You should therefore make this the most prominent call to action and include your telephone number on the top right hand corner of every page on your site. Research shows this is important too, 64% of visitors want to see the company's contact information on the homepage.

Most of us aren't in the office 24/7, even if it sometimes feels like that! It therefore makes sense to have a secondary call to action, which visitors can take when a phone call won't be answered. A simple enquiry form will do the trick. We would recommend including a link to it next to your telephone number.

Finally, not all visitors will be ready to start a conversation with you, but they might like a way to stay in touch. A regular newsletter is the perfect way to do this; you can add value and demonstrate your expertise, whilst maintaining your profile with the potential client.

If you produce a newsletter, or intend to start doing so, we would recommend including a sign-up feature on your website.

Done
To do
Not for us

6

Photos of you and your team

It's a cliché, but nevertheless true; people buy people.

In our experience the 'meet the team' page is usually in the top three most popular pages on an adviser's website. But, despite this, too many sites are impersonal, with the visitor getting no clue about their potential adviser or the team supporting him or her.

We recommend investing in professionally taken images of you and your team. These can then be used on your site and elsewhere too; they really will be a hugely valuable investment.

Done
To do
Not for us

7

A professional picture

As we've already discussed, the benefits of high quality, consistent, professionally taken images of your team are immeasurable.

They can really lift an adviser's site above those of their peers.

As an aside, if you run a multi adviser firm and find it hard to get your team in the same place at the same time, you could consider illustrations of your team as an alternative. These can be very effective, will certainly set you apart and are surprisingly cost effective.

Done
To do
Not for us

8

Create detailed client personas

Bear with us on this one, it might at first glance seem like marketing mumbo jumbo, but we can assure you it isn't.

Most advisers we speak to have a broad idea about who makes a good client. But, usually, that's where it stops, most haven't done detailed work to create detailed client personas.

We recommend doing so.

That deep knowledge of your ideal client will help you build a truly effective website, whilst helping inform how you communicate with your clients in the future and the subjects you will cover.

To put it more bluntly; if you don't know who you are talking to, how do you know what to say?

This is by no means an exhaustive list, but we would recommend answering the following for each of your target markets / client personas:

- Persona name: e.g. close to retirement, at retirement, needing care Demographics: Male, female, age, location, income, employment status Background Job, career path, family etc
- Problems / goals: What do they want to achieve? What problems do they need solving?
- How can you help? What can you do to solve their problems and address their goals?
- In their own words: What do these type of people say to you? Common objections: Why might these types of people not become clients?
- Preferred / acceptable methods of communication: Face-to-face, email, newsletter, podcast etc

Believe us when we say that whilst this might seem like hard work, it makes so many other jobs much much easier.

Done

To do

Not for us

> "That deep knowledge of your ideal client will help you build a truly effective website, whilst helping inform how you communicate with your clients in the future and the subjects you will cover."

9

Clear information about the types of clients you work with

Once you know your target market, your website should give clear information about the types of clients you work with.

Including this information on your website has three benefits. Firstly, it improves the chance of your ideal client getting in touch. Secondly, it reduces the possibility of people who are not in your target demographic making contact. Finally, it shows you are a specialist, people like to deal with advisers who have experience in solving similar financial problems to the ones they have.

But don't stop there.

Done

To do

Not for us

10

Explain the problems you solve

Once you've identified the types of people you work with, you should explain the problems that you solve and the benefits that working with you brings.

Be careful how you do it though.

Visitors to your website are interested in finding solutions to their financial problems. They're not (generally) interested in a list of products, the intricacies of your investment strategies or convoluted explanations of financial terms. If your website says: "We advise on ISAs, Pensions, Investments, Mortgages etc etc" or similar, you need to change it.

These are not financial problems, simply a list of products.

The emphasis should be changed to showing how you can solve the visitor's problems and meet their financial goals.

Done

To do

Not for us

11

Adviser profiles

Again, the quality of adviser profiles range massively, from the non-existent to the comprehensive, which help to demonstrate expertise whilst reducing anxiety in the visitor.

We firmly believe that all businesses, from sole adviser firms to those with multiple advisers, should have a detailed page for each adviser.

Done

To do

Not for us

12

Areas of expertise & the types of clients dealt with

Make the areas you, or your advisers specialise in, clear.

It can be very tempting to say that you provide advice to anyone and that you deal with all areas of financial planning. Whilst the later may be true, people like to know they are dealing with a specialist, who has expert knowledge.

To put it another way, your GP won't carry out your heart bypass!

Done

To do

Not for us

13

Details of their experience

Every adviser profile should contain details of their experience.

This doesn't mean adding the adviser's CV to the website, but details of their relevant experience should be included. Think outside the box here too, if the adviser has held voluntary positions, perhaps with professional bodies, these build credibility and should also be included.

Any positions held outside financial services, such as charitable work, school governorships etc should also be added to the adviser's profile.

Done

To do

Not for us

14

Personal information

Adviser profiles can sometimes be a little dry and dare we say it, corporate.

It's important to add in some personality and, if possible, entertain the visitor.

This could be done through profile pictures; perhaps displaying two, one more business-like and the other more informal, depicting a hobby or an interest.

We also recommend including some personal information about hobbies, interests, likes and dislikes. This could simply be a paragraph of text or alternatively a series of questions which the adviser answers.

Whatever way you do this, it's important that you do. It gives the visitor an insight into the adviser's personality and starts the 'getting to know you' process.

Done

To do

Not for us

> “We are not usually a fan of links out to other sites, after all you want to keep a visitor with you for as long as possible, but we’ll make an exception here.”

15

Links to the FCA register

Financial crime, fraud and mis-selling is big news.

Most articles on the subject recommend checking that your adviser is registered with the FCA. Doing so will help to reduce the anxiety levels in some visitors.

We recommend making it easy for the more nervous visitor to check you out on the register. Include a link to your company page and one on each adviser’s profile, to their own page on the FCA register.

We are not usually a fan of links out to other sites, after all you want to keep a visitor with you for as long as possible, but we’ll make an exception here. Just make sure it opens in a new window, so both your site and the FCA’s are open at the same time.

Very few advisers include links to the FCA register, doing so will show you have nothing to hide, reduce anxiety in the visitor and demonstrate you are transparent with nothing to hide.

Done

To do

Not for us

16

Statement of Professional Standing

We know every adviser must have an SPS but very few make theirs available on their website for prospective clients to view.

We recommend including it as a PDF, explaining what it is, and how the effort you put in to retain it benefits your clients.

Again, this will help to reduce anxiety and set you apart from other advisers who don’t include it on their website.

Remember though to keep it up to date, not doing so will do more harm than good!

Done

To do

Not for us

17

Qualifications

We would recommend listing your qualifications on your website, although perhaps not your 20 metre swimming certificate!

Include all qualifications which are relevant to your role and more importantly, your target clients. Include the full name, we know what G10, G20, RO1 mean, but your prospective clients won't, an explanation of what your qualifications mean to the client and how it means you can help them more effectively because you have it.

Doing so, and making it clear which ones are above the minimum required to practice as an adviser, clearly shows the areas you specialise in and that you have taken the effort to improve your knowledge, whilst putting yourself up for that knowledge to be examined and tested.

Done

To do

Not for us

18

Chartered or Certified status

You've worked hard to achieve this higher level of recognition and it sets you apart from the thousands of other advisers who have not attained this elevated status.

We recommend displaying the accreditation prominently, don't hide it away as some do at the bottom of the website in the footer next to the regulatory statements. It sets you apart; be proud to display it.

But, explain what it means too. Why did you decide to study for Chartered or Certified status? What did you have to do to achieve it? How does it benefit your clients? How does it differentiate you from other advisers?

These are all important questions to answer.

Without additional explanation, they become just another logo. We'd really go to town on this, it sets you apart, you've worked hard for it, so shout about it! As an aside, both the CII and CISI issue guidelines on how the accreditations should be used; these should be adhered to and links to the documents are contained within the resources section of this guide.

Done

To do

Not for us

19

VouchedFor rating

We are big fans of VouchedFor and its fresh approach.

Membership provides you with a wide range of benefits you can leverage on your website. We recommend:

- Using the widget provided by VouchedFor to display your rating on your website
- Use the 'Top-Rated Adviser' graphics and certificates on your website
- Using the testimonials left by clients on VouchedFor on your own website

This information demonstrates your expertise and the care you give to your clients. It's provided by them too, is there any better endorsement than one given by a client?

Done

To do

Not for us

20

Contact details

Calls to action are as important on adviser profiles as they are elsewhere on your site.

We recommend making it easy for potential clients to get in touch by adding the contact details of advisers, including email addresses, to the adviser profile.

I know that the owners of some multi adviser firms are reluctant to include adviser contact details on their website for fear of recruitment consultants plaguing their team. I sympathise, but this will probably happen anyway, and is a small price to pay if potential clients find it easier to get in touch.

Done

To do

Not for us

21

Team profiles

Your back-office team are vital to the smooth running of your business.

In fact, in some firms, the clients have more contact with the back-office team than they do with their adviser, which is why we recommend including their profiles on your website.

Clearly these won't be as detailed as the adviser profiles. But it's important to explain the role they play in your business, their areas of expertise and experience, contact details and of course, some personal information.

Doing this will show to existing and prospective clients alike, that your business has substance and when you are unavailable there will be someone else on hand to answer questions and queries.

Done

To do

Not for us

22

Third party support

Whilst we are on the topic of substance, you may like to include the details of providers of third party support on your website. This can be particularly useful for sole traders.

Including information on your website about your network, or compliance support if you are directly authorised, shows that it's not just you. It demonstrates that you have support, that you take compliance seriously and are happy to submit yourself and your work for peer review.

There are no doubt other third party support providers, such as para planners or research houses which are important to your business and could be included on your site.

Remember the golden rule though, explain the benefits the relationship brings to your clients.

Done

To do

Not for us

23

Press mentions

Being quoted and featured in the financial press is an excellent way of building your credibility and demonstrating your expertise.

It's surprisingly easy to achieve too but that's another guide, for another day.

When you are mentioned or featured in the press we recommend leveraging it in two key ways. Firstly, include links on your website to article. Secondly, tell your clients about it, include links in your monthly newsletter or, if the piece is particularly noteworthy, send out a special communication.

Again, most advisers are never featured in the press (annoying I know, but that's a different conversation) if you are, it'll set you apart from your peers.

Done

To do

Not for us

24

Industry awards

Winning a prestigious industry award is a great way to set your business apart from your peers. It'll give your team a huge boost too and clients always like to hear of their adviser's efforts being recognised.

Entering awards can be a time-consuming and there's no guarantees of success. However, if you win, there are many ways it can be leveraged and of course, it should be featured on your website as a way of demonstrating your expertise and the recognition of your peers.

Done

To do

Not for us

25

Testimonials

Despite cynicism from some quarters, we believe testimonials can be a very powerful way of reducing a visitor's anxiety and demonstrating expertise.

The ideal tectorial will include a photograph of the client, their name and be at least 150 words long. You might think that's a big ask, and it is. Whilst we recognise that many clients won't want to be identified, but some will be very happy to.

If you don't ask, you'll never know.

The next option is to include the testimonial and the client's name or a suitable identifier, preferably including a location e.g. Mr & Mrs Smith from Arnold, Nottingham, becomes Mr & Mrs S from Nottingham.

Finally, anonymous testimonials are still worth including on your site.

All testimonials should link back to the types of clients you work with and your key messages as a business.

- Where should they be displayed?
- On a specific page on your website dedicated to testimonials
- On the pages, which describe the types of clients you work with and the problems you solve
- Finally, on the adviser's profile pages

They should also be regularly refreshed, which is easier if you are using VouchedFor, to reflect the work you are current undertaking.

Done

To do

Not for us

26

Case studies

Case studies achieve several things.

Firstly, they are an excellent way of demonstrating the types of clients you work with. Secondly, they show your expertise and the problems you solve. Finally, if combined with a testimonial, they show that clients were pleased with your work.

Again, case studies should be linked to the type of client you want to attract and your areas of specialism.

There are several ways to write case studies, for example you could break them down as follows:

- The problem your client came to you with (100 – 150 words)
- A broad explanation of your advice (200 – 300 words)
- An explanation as to how the client benefited from your advice (100 – 150 words)
- A testimonial from the client Ideally, they will be of real situations accompanied by a picture of the client; but again that's a big ask and will take some organising

Alternatively, base the case studies in real life, but change key facts, names etc

Done

To do

Not for us

27

Easy editing

Expert designers, developers and copy writers are vital to make sure your website is as effective as possible.

But, there will be times when you want to update it yourself. For example, when a new member joins your team. There's nothing more frustrating than finding you can't do this.

We recommend using a content management system such as WordPress for your site. This allows you easy access to update the pages as and when you need to.

It isn't as complicated as you might think and frankly is no harder to use than most IFA back office systems!

Done

To do

Not for us

> “Expert designers, developers and copy writers are vital to make sure your website is as effective as possible.”

Good quality images

28

We've talked about the importance of high quality images of you and your team, but there may be times, for example on news and blog posts, where an image would enhance the page.

That's fine, but please avoid using clichéd stock images.

We all know what we are referring to; an unfeasibly young couple, who have just 'retired', walking down a golden beach, arm in arm and huge smiles across their face. In reality, they are probably 35!

You can do better than that.

There are many sites which provide inexpensive royalty free images, where you can select from a wide range on non-clichéd images which will enhance your posts.

Done

To do

Not for us

News and blogs

29

Adding news and blogs to your website has a number of key benefits:

- A regularly updated blog gives your visitors a reason to come back to your website
- It's a great way of demonstrating your expertise and knowledge whilst providing value to visitors
- It transitions your website from a brochure to a trusted source of valuable information
- Google likes to see websites being regularly updated with relevant information; they will love seeing your site updated

There's a couple of options here, you could write the articles yourself or outsource the task to a third party, such as The Yardstick Agency. A combination of approaches work well too.

Again, the topic should be linked back to your key client targets, which is so much easier if you have spent time building your client personas.

Done

To do

Not for us

Guides

30

Guides, which are more in-depth than a blog article, are another great way of demonstrating your expertise and giving the visitor valuable information. Again, link the guides to your key target clients and host them on your website; Google will love the extra content.

You need to decide whether to give them away for free or ask for 'payment', usually an email address, in return for the guide being downloaded.

A neat twist on this is 'pay by tweet', which allows visitors to access your content in exchange for a tweet to their followers promoting the guide. This is free and can be found here: www.paywithatweet.com

Done

To do

Not for us

Video

31 The stats are clear, video improves engagement:

- Including video in an email improves click thru rates by between 200% - 300%
- 90% of people say videos are useful in the decision-making process
- 59% of executives would rather watch a video that read text

The thought of writing, filming and editing a video would send most advisers into a spin. But it's really not as hard as it once was. In fact, just check your pocket, you've probably got a mobile studio with you right now.

That's right, your phone.

Sure, it's not going to take Oscar winning cinematography, but, it will be authentic and it can be done easily and cheaply.

We recommend including at least one video on your homepage to engage the visitor and help them understand more about what you do.

You may want to go further, you could make a video of a popular blog so that it reaches an even wider audience who don't like reading content online.

And, with Google owning You Tube, adding video to your website won't do any harm to your search engine rankings either.

Done

To do

Not for us

Fast load times

32 A slow website will infuriate your visitors and displease Google, which could have a negative effect on how they rank your website.

Use the Google tool we shared with you earlier and the resources section of this guide to check the speed of your website.

If the result is that your site is slower than you would like you need to take action, which could mean changes to your site, to speed it up, or moving your hosting.

Done

To do

Not for us

33

Fully completed page titles

The page title or title tag helps search engines understand the content of each page and on search engine results pages to show a preview snippet of the page content.

It is therefore important they are included in your site.

They should contain relevant keywords, be unique and be a maximum of 55 - 60 characters.

Again, this isn't as hard as it sounds. Most content management systems, such as WordPress, have SEO tools, known as plugins, which will make the job easier. Alternatively, it's another one of those tasks you could outsource.

Whichever option you choose, it's vital you help Google rank your pages as relevantly as possible.

Done

To do

Not for us

34

Fully completed metadescription

The meta description is a 160-word summary of the content on a webpage. This information displays on the search results page and therefore plays a key role in helping the searcher to decide whether to click on your website.

Meta descriptions should be an accurate description of the page, contain relevant keywords and be unique to that page.

Again, this is relatively easy to do via a plugin to your CMS.

Done

To do

Not for us

35

A submitted sitemap

A sitemap is a file of code that lives on your web server and lists all the relevant URLs that are in the structure of your website.

It helps search engine web crawlers determine the structure of the site so they can crawl it more effectively.

Once built, the XML site map should be submitted to the key search engines, to help them differentiate each page from another.

Done

To do

Not for us

> "Most content management systems, such as WordPress, have SEO tools, known as plugins, which will make the job easier."

Conclusion

These days both existing clients and prospective clients expect advisers to have a website.

It's an overused phrase but your website is your shop window; it's your chance to inform and impress. It's crucial to a successful referral and recommendation strategy; which is of course, the best way of attracting new clients. And central to your wider marketing strategy.

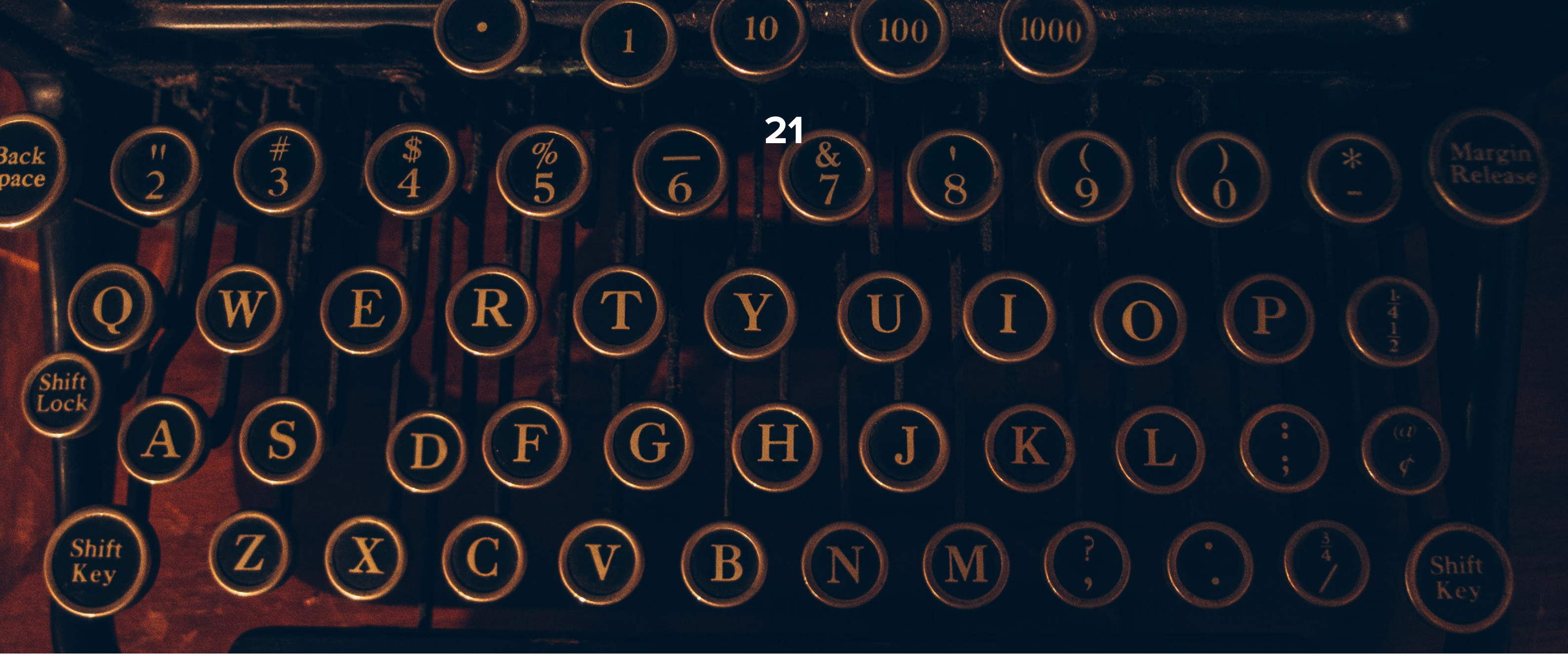
Get it right, and it will help you engage with clients, both old and new. Get it wrong and it will reflect poorly on your business, hampering your ability to retain existing clients and attract new people to advise.

Our guide is based on years of experience; we know what works, and what doesn't, please learn from our mistakes! We hope you find it useful.

We recommend using it as a checklist, tick off the items your website already includes, you can then work through those that are left.

Of course, we are here to help. If you feel your website needs a refresh, new content or completely redesigning, we are here to help, call us on **0115 8965 3000**
or email **hi@theyardstickagency.co.uk**

Phil Bray
Founder and Director
The Yardstick Agency



Resources

Google Analytics

www.google.com/analytics/analytics/features

Test your website's mobile friendliness

www.testmysite.thinkwithgoogle.com

FCA Register

www.register.fca.org.uk

Guidelines for using the Chartered designation and logo

www.cii.co.uk/media/1930034/coh_j010615_chartere d_logo_usage_guidelines_v1_web__2_.pdf

Guidelines for using the Certified designation and logo

www.cisi.org/cisiweb2/docs/default-source/Financial-Planning/cisi-brand-guidelines.pdf? sfvrsn=4

Pay with a Tweet

www.paywithatweet.com

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