YARDSTICK

CHECKLIST SERIES

Checklist #15: 14 ways to get the most out of your Money Alive subscription

For those not in the know, Money Alive produces educational video content for financial advisers and planners to use with clients, prospects and professional connections.

The 64 unique videos have both marketing and compliance uses and are divided into the following 'box sets':

- Business protection
- Drawdown Review
- Final Salary – stay or transfer
- Flexible income
- Guaranteed income
- Pension Freedoms
- Power of Attorney
- Understanding Long-Term Care
- Wills

A range of subscription options are available. Each level gives a certain number of credits, which are then used up during the month as your clients, prospects and professional connections watch the videos.

We've also partnered with Money Alive to develop a special offer. Clients of The Yardstick Agency get:

- 10% more credits as part of their subscription
- Access to the Money Alive marketing 'bolt-on'

The video content is superb and can be used to:

- Educate and inform existing clients
- Engage and educate potential clients
- Develop relationships with professional connections

This checklist should only be used after reading the accompanying blog, which can be found here:

https://theyardstickagency.co.uk/blog/14-ways-to-get-the-most-out-of-your-money-alive-subscription

1

Build a video library on your website

Use the box sets to create an educational video library to engage, inform and educate visitors to your website.

Done
To do
Not for us

2

Use the videos in lead magnet campaigns

Run adverts on social media using the Money Alive box sets as lead magnets.

Done
To do
Not for us

3

Develop a process for following up leads

Build processes for following up and nurturing people who have watched the videos until they are ready to meet with you.

This nurturing process should include:

- Telephone calls (if they provided their number)
- Sending emails with other content, including blogs and guides to complement the box sets they watched
- Suggesting they watch other box sets

Done
To do
Not for us

4

Use the Refer a Friend feature

This feature means that people who finish watching a box set are emailed a link which they can then forward on to friends, family and work colleagues. When the friend/colleague clicks on the link, they'll have to input their own information, meaning you'll be able to capture them as a lead too.

Done
To do
Not for us

5

Include the videos in your newsletters

Add a screen capture and link to a box set in each newsletter, giving the recipient another way of interacting with your business.

Done
To do
Not for us

6

Form partnerships with solicitors

Use the Wills and Power of Attorney box sets to create opportunities among your existing clients and prospects, which can then be referred on to professional connections.

Done

To do

Not for us

7

Form partnerships with accountants

Offer to run campaigns for accountants you already know, or want to work with, promoting the benefits of business protection to their clients.

Done

To do

Not for us

8

Communicate with members of group schemes

Add webforms to employer intranets so members of the group schemes can then watch the videos.

Done

To do

Not for us

9

Help your clients and prospects prepare for meetings

Send clients and prospects a link to the relevant box set before the meeting.

Done

To do

Not for us

10

Add Money Alive reports to your client file

The Money Alive report shows:

- Whether the entire chapter within a box set was watched. If the client/prospect answers 'no' to this question they are directed back to the start of the chapter
- Whether the client/prospect understood the content. If the client/prospect indicates they didn't understand something they are asked to confirm what they would like more information on.

Downloading the evidence pack, which also includes a low-resolution version of the video, could be worth its weight in gold in the event of a future complaint.

Done

To do

Not for us

11

Send better quality referrals to pension transfer specialists

Triage potential clients first by using the 'Final Salary - Stay or Transfer' box set.

Done

To do

Not for us

12

Add templated paragraphs to your suitability reports

Use the templated paragraphs to seamlessly reference the videos in your suitability reports.

Done

To do

Not for us

13

Use the DIY video email feature to send messages to clients

The DIY video email feature allows you to use video messaging to communicate with clients. Videos can be:

- Recorded elsewhere, for example, using your phone and uploaded to Money Alive, or
- Recorded directly on the platform.

Use the optional additional security features to protect sensitive information contained in the video.

Done

To do

Not for us

14

Record and send a welcome message to prospects

Send welcome messages to new prospects before your first meeting with them.

Done

To do

Not for us

What next?

If you already subscribe to Money Alive: Work through this checklist to decide which of our top tips are relevant to your business. If you would like our help implementing any of the recommendations please contact us by emailing **hi@theyardstickagency.co.uk** or call **0115 8965 300**.

If you don't already subscribe to Money Alive: Set up a demonstration of the system and a free trial by emailing Nigel Bergin on **nigel.bergin@moneyalive.co.uk**. Then, work through this checklist and contact us if you would like help implementing the recommendations.

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