



## Checklist #12 : 13 ways to publicise that you are a VouchedFor's 'Top Rated' adviser

On Saturday 8th February VouchedFor will publish their 2020 Top-Rated Adviser Guide in The Times newspaper.

If you're included, congratulations! It means you've worked hard to delight your clients and build your social proof.

Once you've given yourself a well-deserved pat on the back, it's time to promote your inclusion. If you qualify, a top-rated adviser banner will be added to your VouchedFor profile. This will differentiate your profile from those which don't have it. Logically, it should also improve the click-thru rate to your profile.

VouchedFor will also provide a range of other tools and assets to help you promote your inclusion, including:

- A trophy, engraved with your name – **new for 2020**
- Ratings/review widget for individual advisers/planners and their business
- A focussed Top-Rated Adviser Certificate (separate to the existing Certificate of Excellence) – **new for 2020**
- Printed versions of the Guide (with newsprint and glossy options) – **new for 2020**
- The Top-Rated Adviser logo

All of the above can be accessed from the 'Reputation Tools' of your VouchedFor account.

Here are 13 things we recommend you do with them.

### Impress clients, prospects and professional connections who visit your office

Your inclusion gives you many ways to impress visitors to your office. We recommend:

- Buying a trophy from VouchedFor (it's engraved with your name and costs £69.99 plus VAT) then displaying it prominently so visitors can't fail to see it. If you've got multiple advisers or planners who qualify we recommend buying a trophy for each. It'll demonstrate consistency of performance across your firm
- Marking where you're included and leaving a copy of the printed guide in your reception for visitors to read
- Display the Top-Rated Adviser Certificate in your reception and meeting rooms



1

2

### Create a meeting confirmation pack (or amend your existing pack)

When you confirm a meeting, particularly with a prospect who isn't yet a client, we recommend sending a pack of useful information. It might include directions to your office, information about where to park and details of the documents they should bring.

To impress the prospect and validate their decision to meet you, we also recommend including a copy of the Top-Rated Certificate and a PDF of your reviews.

Done



To do



Not for us



3

### Tell your existing clients

We recommend emailing your clients to:

- Thank them for taking the time to leave a review
- Ask those who haven't left a review to do so (remember to make it easy by including a link)
- Remind them that you welcome being referred on to others and that, as a 'Top-Rated Adviser' their friends, family and work colleagues will be in safe hands

Done



To do



Not for us



4

### Use the VouchedFor Referral Generator tool

As an alternative to the above, tell your clients that you qualified for the Guide by using the Referral Generator tool. It's an email 'from' VouchedFor but triggered by you. It thanks the client for their review and tells them it helped you qualify for the Guide. It then asks the recipient to refer you to people who could benefit from your services.

The stats show the results are positive:

- 63% open the email
- 34% share it with one or more friends

You won't be charged for any enquiries received through this referral generator.

Done



To do



Not for us



## Update your website

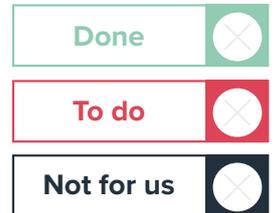
Impressing online is vital for generating new enquiries. Nowhere is that more important than on your website. VouchedFor and the Guide will help you do that. We recommend:

- If you've not done so already, adding the VouchedFor adviser rating/ review widget to the relevant pages of your website. That should definitely include your homepage, your 'why us' page and individual team member pages (you do have those don't you?)
- If your business has more than one adviser then add the overall rating/ review widget, showing the rating for your firm and a selection of your team's reviews, to relevant pages
- Adding the 'Top-Rated' logo to your website, again in relevant places along with an explanation of what it means and link it to your individual 'Top-Rated' certificate. You can see an example of how we've done this for a financial planner by [clicking here](#) and scrolling down the page

Be careful where you position these widgets too. We've often seen them added to the footer of websites, giving them the same prominence as regulatory statements.

Why would you do that? The widget demonstrates how happy your clients are. It needs to be displayed prominently, not hidden away.

5

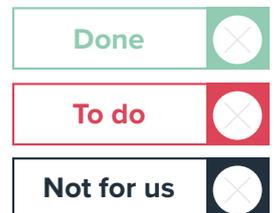


## Write a blog or record a video

If your website has a blog or news section add an update explaining your inclusion. Alternatively, you could record a short video (thanks to technology most of us have a recording studio in our pockets now) and post that on your website. Either way, we recommend including:

- A brief explanation of what VouchedFor is
- Confirmation that ratings and reviews are based on feedback from genuine clients, which make the ratings extremely powerful
- The criteria for your inclusion
- Your rating (using the handy widget provided by VouchedFor, see point 5)
- A selection of your best reviews
- A link to your Top-Rated Certificate or the Guide itself

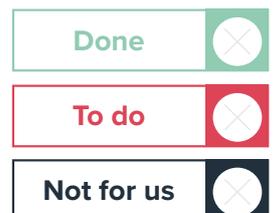
6



## Update your social media profiles

Add the logo and an explanation about the code to your social media profiles. If possible, include a link to the explanation you wrote in recommendation three.

7



### Use social media to shout about it

Once you've written the blog or recorded the video, publicise it on social media:

- Write different messages for each channel (identical messages look lazy)
- Add an image of the certificate provided by VouchedFor (posts with images get more engagement)
- Click 'post'!

Remember to post multiple times too. Repetition of your key messages is crucial if you want as many people as possible to see them.

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

8

### Update your stationery

Update your business card and letterhead with the Top-Rated logo.

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

9

### Update your email signature

Your email footer will probably be seen by dozens of people each day. It's the perfect place to publicise your rating and inclusion in the Guide.

Add the button provided by VouchedFor to your signature.

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

10

### Tell professional connections

If accountants and solicitors are a valuable source of new enquiries, your inclusion provides further evidence that clients who they refer to you are in safe hands. If you're emailing clients, include professional connections on the distribution list too.

Update your professional connection due diligence packs with the certificate and a copy of your reviews.

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

11

12

### Buy copies of the report

Through your VouchedFor account, you will be able to buy copies of the Guide. We recommend buying a supply, marking your entry then:

- Leaving a copy in your reception area for visitors to read
- Providing copies to professional connections

Done



To do



Not for us



13

### Publicise reviews in the future

Every time you get a new review in the future, use the tool in the 'Reputation Tools' section of your VouchedFor account to share it on your social media accounts.

Done



To do



Not for us



### Develop a plan and move quickly

In an age when traditional testimonials on a single page of your website are dead (hardly anyone looks at them) VouchedFor's client-driven social proof is incredibly powerful.

But, it's only the advisers and planners who make the effort who will get the benefit from being included in the Guide. Your hard work, the reviews left by your clients and this great initiative from VouchedFor has given you some great ammunition, now's the time to use it.

If you would like our help or have any questions, please don't hesitate to get in touch.

You can reach us by emailing [info@theyardstickagency.co.uk](mailto:info@theyardstickagency.co.uk) or calling the office on **0115 8965 300**

☎ 0115 8965 300

✉ [hi@theyardstickagency.co.uk](mailto:hi@theyardstickagency.co.uk)

🌐 [www.theyardstickagency.co.uk](http://www.theyardstickagency.co.uk)

📍 The Yardstick Agency,  
3<sup>rd</sup> Floor,  
3-7 Middle Pavement  
Nottingham, NG1 7DX



YARDSTICK