



THE ADVISOR WEALTH
MASTERY

PRESENTS



STEPHEN OLIVER, MBA, Ph.D. GREG MOODY, Ph.D.

EXTRAORDINARY
MARKETING
FOR FINANCIAL ADVISORS

HOW TO CREATE AN INFINITE STREAM OF NEW CLIENTS ON DEMAND

*The complete marketing program with Stephen Oliver AND Greg Moody—
covers strategies and tactics for marketing your financial advisor practice.*

SEO AND WEBSITE

www.AdvisorWealthMastery.com | Phone: 303-808-8719

STEPHEN OLIVER ([00:00](#)):

Hey guys, we're going to talk about websites, website development, SEO, online marketing from the standpoint of search and websites, and those are interchanged a little bit. Not from a standpoint right now of social media and some of the other sources that are online sources. But let's start with this. So [Greg 00:00:24], you did [crosstalk 00:00:26]-

Greg ([00:25](#)):

Yeah, we just did a search, we're here in beautiful Annapolis, Maryland. So we just some random searches. So we're giving you some examples that we pulled up just a few minutes ago, and this is, "Financial advisor, Baltimore," and this gives you an example of what ... For some of you guys you're familiar with this, but we wanted to explain what you get when you do a search result. So when somebody searches in Google and they search for financial advisor, we did Baltimore, or we've got another one for Annapolis, Maryland. But even if I left out Baltimore or Maryland, Google knows where you're at. So you're typically going to get a result like this.

STEPHEN OLIVER ([01:00](#)):

Yeah. Now, and let's start with real basics. And so if you're way ahead of us, that's fine. But for anybody who's not, "Financial advisor, Baltimore," are keywords. So what happens is, and for those of us who are our age, we remember when people looked up financial practices, one thing or another in the Yellow Pages, and the Yellow Pages was easy. There was a heading, everybody was there, you bought ads. But with Google, one of the keys on search optimization, is show up in a bunch of iterations of keywords. Because what happens, is the keywords are whatever the individual looking for you is looking for. So it might be, "IRA conversions," or, "401k conversions." It might be, "Retirement planning." It might be, I mean, think of the iterations, [crosstalk 00:01:53]-

Greg ([01:52](#)):

Yeah, if you're old enough to think of the Yellow Pages, they had to be, they narrow things down. They had to look for the kind of business. But on Google they'll search for the specific thing they want, as you said, "IRA conversions, IRA, cashing out my IRA, converting my IRA, converting my 401k."

STEPHEN OLIVER ([02:11](#)):

"Someone to help me with retirement planning."

Greg ([02:13](#)):

Right, there's a lot of things they might be searching for. This one we just gave a very general search.

STEPHEN OLIVER ([02:20](#)):

Yeah, and now what we have, is go ahead and scroll, go ahead and [crosstalk 00:02:26]-

Greg ([02:26](#)):

Well, I want to maybe point out here, this top part, when you think about a search result, this is important to note. This one that says, "Ad," here, this is what Google makes all their money from. And it's called AdWords. And so when people will talk about pay-per-click, or Google advertising, this is, there's more than this, but this is a big part of what Google advertising is. It's pay-per-click advertising.

This is what Google became rich, and became a big company on, these search results. So they look like regular search results, but of [crosstalk 00:03:02]-

STEPHEN OLIVER ([03:02](#)):

[crosstalk 00:03:02] dollars, yes.

Greg ([03:02](#)):

Yeah. But you think, you know that these are paid results, because it says, "Ad," here. And when people click on these, there's no charge for these companies to show up here until they get clicked on. Then when you click on them, any of these companies that were paid to be there, will have to pay a fee.

STEPHEN OLIVER ([03:20](#)):

The monetization strategy stolen from Go2.

Greg ([03:22](#)):

Yes, and it's made them rich. This next part is the maps section, and this-

STEPHEN OLIVER ([03:29](#)):

Here's [inaudible 00:03:30].

Greg ([03:31](#)):

Right, exactly. So this is, as you can tell, this is paid, but this is comes from Google My Business. So, and it used to be called Google Local Business, Google Places-

STEPHEN OLIVER ([03:42](#)):

Google Plus

Greg ([03:43](#)):

Yeah. But now currently it's Google My Business. And you need to have your business here, you need to make sure your business is claimed in Google My Business, and also make sure you have reviews, and you maybe want to talk about reviews [crosstalk 00:03:57]-

STEPHEN OLIVER ([03:56](#)):

Yeah, and these aren't bad from the standpoint of most everybody who said anything, says something nice about them. But frankly, four reviews, nine reviews, 10 reviews is anemic. And I understand it. Some of you're probably thinking, "Well, but we can't use testimonials, and legally and all this stuff." And in the reality, laws have changed. But what testimonial Law in all across all industries has always been, you can't make outrageous claims and one thing or another, and you've got to have representative results, not results that are unique. So if one person has tremendous results and nine people have mediocre results, you can't just use the one example for instance. But to keep it simple, is you really can and should work really aggressively to get Google reviews.

STEPHEN OLIVER ([04:52](#)):

Now there're all kinds of different ways to do that. There's different apps. Oh, there's a couple that advertise on TV, we've used, I don't even remember their name. I haven't been impressed with any of them, to tell you the truth. But the thing to do on this, is when you're actually meeting with clients, number one, is if they're happy, and they're having progress with you and one thing, just ask them, "Hey, have you had a chance to do a review on our practice yet? Oh no? Would you mind if I just texted you right now the link and put up, we love to have positive customer ratings up on Google and Facebook. Would you mind doing that for me?" So when you're meeting with them face to face, or if you're meeting with them on the phone, or if you're meeting with them in Zoom. Now, what you don't do, is put the, "Rate us," on Facebook, sign on the door, because nobody does it. And you don't do the, "Hey when you get home, would you give us a nice rating on Google? Because then they forget it, right?"

Greg ([05:54](#)):

Or bribed.

STEPHEN OLIVER ([05:55](#)):

Yeah, or bribe them. Yeah, you don't pay them to do it. That's for sure. But just, you get in the habit of every time you're having a conversation, especially with a new client, you just ask them, "Would you mind doing a positive review on Google for us? It's really helpful? Oh no, here let me text it over to you right now." And then they can just do it right on the spot. The only caveat is make sure they're not on your office wifi, because then Googles will tag you for everything coming from the same IP address.

Greg ([06:24](#)):

Yeah, so they can be on their cellular phone, if they do it right in your office. That's just fine, on their cellular. Make sure that when you, for your business, that you do fill out everything you possibly can on Google My Business. Couple other things, you notice how these businesses say that they're open, because it's during the day now? If you are an individual operator and you maybe you don't get in your office until noon, because good, I mean you have a good lifestyle and you're keeping your hours pretty short, still make sure that your business, maybe you're not physically in the office. Because maybe you're on calls, but you're still answering the phone. Make sure that you show your business hours is all day, because otherwise this is going to show red, and it's going to say you're closed. And make sure that you put as many possible things as you can in Google My Business, photos-

STEPHEN OLIVER ([07:17](#)):

Videos.

Greg ([07:17](#)):

... and pictures of your office and videos. You can put all kinds of stuff in there and that helps move you up in this listing. But a real important thing is the number of reviews. And also making sure you have a solid website, which we're going to go over next.

STEPHEN OLIVER ([07:32](#)):

And what I should address, is some of you don't know how to even get there, to do the review. Just go to Google Maps, go to Google Maps, maps.google.com, and search for your business. When you get to your business, it'll show you right there, a link for testimonials or reviews. Then you can just text them the link directly to that page, to put a link on. So it's really easy to find.

Greg ([07:57](#)):

Yeah, and there's also a, "Claim this business," or, "Do you own this business," link depending on, Google changes the way that, we want to make sure that this is going to work for you guys. Google does change the way these links work occasionally. So just because we say, "This is where it is on Google," make sure you pay attention and look around a little bit, because Google's notorious for changing the way that they operate and the way they do their algorithms a little bit. So just because we say it looks exactly this way, it might be different. And so we help our clients navigate through this whole process.

STEPHEN OLIVER ([08:31](#)):

Yeah. So as we're going through here, these would all be what you would call the organic listings, right? So you have the Google My Business, you have, which is organic as well, I guess, to be fair. Then you have a pay-per-click or AdWords listings, and then you have these organic listings. Your mission is especially in a geographic area, or in a niche, to show up on page one of Google. What's the old joke? Best way to be anonymous is to show up on page two or three of Google.

Greg ([09:03](#)):

Right, yeah, if you're not on page one, you're probably not going to get any traffic from this part of the listing. Even if you, and this does affect your AdWords results, it does affect your results. So even if you pay a lot of money for AdWords marketing, or Facebook marketing, if you're not showing up here in this first page, you're going to be paying more for your clicks, you're going to get a lot of people that won't find you, for a lot of other reasons, which we done a time to go into today. This is based on a lot of factors.

STEPHEN OLIVER ([09:36](#)):

Yeah, and we'll get to that. I might point out, one of the listings here shows up as Yelp, "The 10 best financial advisors in," or, "Advisor in Baltimore." You have an opinion about that?

Greg ([09:48](#)):

Yeah. We've never seen Yelp be a really good thing to spend money on. You should, they allow you to have a listing [crosstalk 00:09:56]-

STEPHEN OLIVER ([09:56](#)):

I might caveat that if I was a restaurant owner.

Greg ([09:59](#)):

Yeah, if you're a restaurant owner, certain other businesses, Yelp would be a great way to, I would probably put some money into that. Yelp is really good at calling you, and asking you to spend money on them though. Especially if you, when you fill out your information on Yelp, they're relentless. They're very good. I really copy their business practices for their outbound calls. But for your business, they're probably not going to be effective at all. Unfortunately we've seen a lot of our clients, before we started working with them, spend thousands of dollars on Yelp and get zero return. So Yelp isn't really where people go to find your type of business. Again, it said restaurants-

STEPHEN OLIVER ([10:40](#)):

[crosstalk 00:10:40] Well, and to be a little bit more brutal, I mean they're a protection racket?

Greg ([10:42](#)):

Yeah, they really are. It's like what the Better Business Bureau used to be, "Be on the Better Business Bureau and be a highly rated business. But if you don't pay us money, then we're going to rate you down, and we're not going to clear your bad complaints." So that's what Yelp is, "If you don't pay us money, then we may not rate you very highly." But it really won't help you to pay the money. It will help you to make sure people rate, write reviews for you there, and fill out your information there.

STEPHEN OLIVER ([11:11](#)):

Generally the only place that I consider Yelp to be important at all, frankly, is when somebody is coming to your office and they go to Apple Maps, you're going to show up under Apple Maps. And one of the things also, is you can claim your position on Apple Maps. So you can go to Apple and we can give you the details in the notes, but you can go to Apple and claim your position, make sure just like in Google Local, that is set properly. But when you pull up a listing on Apple Maps, it'll show the rating from Yelp, not the rating from Google. So that's the only time the rating from Yelp is particularly important from my standpoint for [crosstalk 00:11:54]-

Greg ([11:53](#)):

Exactly. Yeah. So you want to spend a little time on Yelp to put the information in there, and then get people to review you, but that's about it. The good news is once you do that, do a little bit of late work, you pretty much can ignore it, other than occasionally getting reviews to be pushed into Yelp.

STEPHEN OLIVER ([12:09](#)):

And probably order of priority would be Google reviews, Facebook reviews, Yelp review-

Greg ([12:14](#)):

Absolutely-

STEPHEN OLIVER ([12:14](#)):

... and then anything else.

Greg ([12:15](#)):

Right, and again, those reviews get picked up by other services. So that's another reason why they're really important. And don't get nervous about compliance. Because we talked about this before, you do want them, they just have to be done correctly.

STEPHEN OLIVER ([12:31](#)):

Right. All right. Okay. So, and we were going to go through some specific financial advisor websites.

Greg ([12:38](#)):

Did you want to talk to-

STEPHEN OLIVER ([12:39](#)):

No, go ahead?

Greg ([12:40](#)):

One thing about how you get rated, and we're going to talk about the advisor websites, the biggest thing to get rated on page one, and really the only thing, is content. You have to have a lot of content. Bill Gates coined the term, I think first, "Content is king." And there's three main areas. One is that there's lots of content, the second is there's newer content, it's refreshed, it's new. And the third, maybe the most important, is that it's relevant. So you wouldn't be posting content on fly fishing, or you might, if that's your niche, if you do financial advice for fly fishing aficionados. But you wouldn't be posting content, you'd want to post content that's related to the keyword, and that's-

STEPHEN OLIVER ([13:27](#)):

At least for search optimization?

Greg ([13:29](#)):

Right, for search optimization.

STEPHEN OLIVER ([13:31](#)):

Let's define that a little bit, is content would be written material, often referred to as a blog. It would be audio material, video, material photos. So that encompasses the choices. But by developing a blog, in other words, posting written material, and those can be reports, they can be transcripts, they can be articles. They can be, you do a daily email out to your clients, and you repost them. We'll go more in depth into search engine optimization. But that's the type of content, is video, written, photos and audio. Audio oftentimes referred to podcasts. And so what we'll-

Greg ([14:16](#)):

And video can be podcast.

STEPHEN OLIVER ([14:18](#)):

Exactly. So what we'll typically do is have a section with a bunch of videos. They'll turn into podcasts, they'll go out to all the directories, they'll go out separately to YouTube. We'll have a section with blog posts, those blog posts can be repurposed judiciously in LinkedIn and Facebook. But generally what you're doing, is making sure there's not duplicate content. That's the mistake people make. They're involved with an organization, let's say, with Northwest Mutual and they have a ton of stuff that's available for their advisors, but you couldn't pull all that stuff out and put it on another website, because now you get ding for duplicate content and it actually hurts rather than helps your service.

Greg ([14:55](#)):

Yeah, google doesn't want your content to be repeated, they want it to be unique. They don't want it to be duplicate of other content that's out there. It's not strictly because it could be plagiarized or copied from somebody else, but it's just because it's not unique, it's not new. So then it lowers your ranking. So it's negative in terms of getting listed up here. So what you want it to be, is unique, a lot of it, you want it to be recent, so that if you just put a lot of content on your website, but never added any new content, your ranking would drop. So it needs to be continued to be added to, and then it needs to be relevant to your keyword. Then the last thing would be, it should be unique. If you just pulled a bunch of stuff from a, I don't know, found stuff from a book and then just copied it, it wouldn't work. It wouldn't help your search engine optimization.

Greg ([15:45](#)):

Now, oops. You see a lot of people that pay other companies for SEO, and be really wary of ... One reason that we're doing this for you, is so that you can be smart consumers of the companies you might outsource to. And we don't expect you to build your own webpages for what we are going to do next. In fact, probably most of you shouldn't be doing that. But what you should be, is smart enough to know who you're outsourcing to and what you're doing. We have some companies we recommend, but it's really important to understand the difference between these things.

Greg ([16:24](#)):

So even though maybe some of this stuff is technical, it's, you've got to dig into it a little bit so that you can be smart about how you move forward and do the right things. Because we see a lot of people that just have a friend build their websites, or somebody in their office or. And it ends up really being negative for their company and their practice.

STEPHEN OLIVER ([16:46](#)):

Mostly they just end up with brochureware.

Greg ([16:48](#)):

Exactly, they end up with stuff that's brochures. So we're going to show you some of this now.

STEPHEN OLIVER ([16:51](#)):

And to be fair, we're not digging too deep on that, but search has, the page has to be set up properly. Google really cares about loading speed, and they care about it being completely mobile, and [crosstalk 00:17:05]-

Greg ([17:04](#)):

Yeah, mobile's really critical. Yeah, mobile's critical. Most websites, even when they tell you that works on mobile, are really not built for mobile. And 80% of searches now are mobile, on tablets or on phones. So it's going to lower your ranking on desktop, this is a desktop search. But it's going to lower your ranking even on desktop if your website isn't mobile-friendly, not mobile-friendly, but really built for mobile.

STEPHEN OLIVER ([17:29](#)):

Yeah, and there's some other areas like [inaudible 00:17:32]. So we won't go too deep in that, but also rankings, and Google, I mean incoming links, I'm sorry. Google started with the whole idea of PageRank. And Page is the co-founder. But the idea was incoming links. So the idea is, if other credible sites found your site credible, then obviously it must be credible, and it pushes it up in the rankings. So you really want to think about three pieces just to be simple, is making sure the site is structured well, loads fast, the right tags behind it, all that kind of technical stuff. And make sure that it loads for mobile easily and appropriately.

STEPHEN OLIVER ([18:12](#)):

Number two is work on incoming links. You being listed directories and all over the internet. That can be doing, being a guest, blog post. It can be PR sites, et cetera. And then content in your site. Really that

becomes the most important, assuming it's set up right, is then developing lots and lots of content. We can show you later, but we can show you a lot of shortcuts developing in a ton of content.

Greg ([18:39](#)):

Right, and we can get with the right people to make sure the rest of that tactical stuff is done right. We just want to make sure that you understand it, so that you can be smart about it. Let's show them, [crosstalk 00:18:48].

STEPHEN OLIVER ([18:48](#)):

[crosstalk 00:18:48].

Greg ([18:49](#)):

Yeah, let's look at one more thing on the search results.

STEPHEN OLIVER ([18:52](#)):

Oh yeah.

Greg ([18:52](#)):

We do, this is a pretty new thing that you should look at, is the Google Screen. Yeah, and not every business can get Google Screen. It's a function that financial planners can do. If you look at the information, oh, this is different. Let me pull up the right one.

STEPHEN OLIVER ([19:14](#)):

Terms, policies.

Greg ([19:15](#)):

Learn more here.

STEPHEN OLIVER ([19:16](#)):

Oh, okay.

Greg ([19:17](#)):

So Google Screening, so what you do is you can get a little box and rating. You have to fill out your Google My Business information, that we just talked about. Then what you can do here, is you can follow the directions and you can-

STEPHEN OLIVER ([19:31](#)):

It's right here.

Greg ([19:34](#)):

Yeah, you can look at financial planners and you can get screened by Google. It's just a background check that Google does, which is really easy for you to do, [crosstalk 00:19:46]-

STEPHEN OLIVER ([19:48](#)):

[Crosstalk 00:19:48] properly licensed anyway, it just does a check for your licensing, that you have insurance and that you are who you say you are.

Greg ([19:57](#)):

Right, and then that gives you, without any additional, it's not additional cost, but then these would be part of your AdWords purchase. So if we clicked on these guys' links, we'd be going to their website, and they'd pay their normal AdWords cost. So that's the reason you want this. I mean, it does give you some credibility, but it also rates you higher in the AdWords listing.

STEPHEN OLIVER ([20:28](#)):

Yeah, and again, we're in Annapolis, Maryland, because we're doing a leadership training behind the scenes at the Naval academy. But we just pulled up randomly some financial advisors in Annapolis, and in Baltimore.

Greg ([20:44](#)):

[crosstalk 00:20:44]

STEPHEN OLIVER ([20:45](#)):

Yeah, we thought we would go through them with you. So we're discovering them at the same time, and give you a little critique, the positives and the negatives.

Greg ([20:52](#)):

So the first thing we talked about, was about getting ranked and that gets you more traffic. Now, what we're going to talk about, is once they land on your page, how you would get them to convert into a phone call, or they'd fill out some sort of form, so you could contact them. Make sure you understand, your goal of this is to get an appointment with them, and get to talk to them. So no matter how much traffic you get, if they land on your website, and it doesn't turn into an appointment, or it doesn't turn into some sort of conversation, then the website didn't do any good, even if it got a lot of traffic. So what we're going to critique these, with that in mind.

STEPHEN OLIVER ([21:27](#)):

Yeah, so let's look at [crosstalk 00:21:29]-

Greg ([21:28](#)):

And we haven't really looked at these either, so this is going to be new. So we're going to give you some feedback, right as-

STEPHEN OLIVER ([21:36](#)):

It's working without a wire, so to speak. So what does our solutions have there?

Greg ([21:42](#)):

Well, I would say-

STEPHEN OLIVER ([21:43](#)):

[crosstalk 00:21:43]

Greg ([21:43](#)):

I'm would to say something first off here.

STEPHEN OLIVER ([21:45](#)):

Yeah.

Greg ([21:45](#)):

There's really nothing on page, a big error here, if our goal is to get a phone call, or to get an appointment from it, where's the phone number? So I might be ready, I might have even wanted to talk to these guys because I might have gotten a referral to Marks Wealth Management, and I might have wanted to talk to these guys, but there's no phone number here. So I have to dig into the website, and what people don't think about, is every time they click, every time they scroll down the page, that's another chance for them to abandon your website and say, "Oh, maybe this wasn't the right place. Maybe I got some, or maybe I'll go get coffee now. Or maybe I'll do something else." So [crosstalk 00:22:26]-

STEPHEN OLIVER ([22:25](#)):

And to be fair, think about it like a newspaper, so this would be what we would call above the fold?

Greg ([22:30](#)):

Right.

STEPHEN OLIVER ([22:31](#)):

So if you had a newspaper, above the fold is as folded, is what you see when it's stacked up. And what he's saying, is you want the phone number to be above the fold, not have to click and go to a second page, not have to scroll to the bottom and find it, but you want it ... I always think they're going to look at the top right hand corner more or less, and where it says, "Contact us," you could just as easily have those menu items, or different menu items, but you could have the phone number stuck right up there.

Greg ([22:59](#)):

Yeah, and when it goes to mobile, this is not going to have, the problem is too, when this would be resized to mobile. See how, when we resize it to mobile, this was my guess, see how it doesn't resize. You don't see, it doesn't look like an app, so this is cardinal sin. Whoever developed this, didn't know how to build websites. So this website isn't going to rank very well either. But when it resizes, what should happen, is there should be a little phone button there, like a little icon for the phone. So maybe I was in my car, and I got referred to this company, and I looked them up at a stoplight, and I want to call them now. I can't even see the Contact Us-form. Now, if I go to the Contact Us form, now there is a phone number, so that's good. Here's an error that a lot of people make, and you might be seeing this on the site. If you have a live email address, whoever built their site, hopefully they're not watching this, because-

STEPHEN OLIVER ([23:58](#)):

Hopefully they are, they-

Greg ([23:58](#)):

Yeah-

STEPHEN OLIVER ([23:59](#)):

[crosstalk 00:23:59].

Greg ([23:59](#)):

Well, they'll be very insult by it.

STEPHEN OLIVER ([24:00](#)):

... take some advice.

Greg ([24:02](#)):

Because anybody who built this site, clearly doesn't know anything about programming in 2021 or whenever you're hearing this in, because even in 2016 or '17, you wouldn't do this, because this invites hacking. So when sites, when hackers skim sites, if they pull email addresses, this email address is very likely to start getting hit with a ton of spam, because the email address is live. So you never want a live email address. You might say, "Well, how are they going to get to us?" Well, by filling out a form, this is safe. But you never want to have live email addresses. So this is one way to evaluate a website. If they have a live email address, you know the programmer didn't really know what they're doing.

STEPHEN OLIVER ([24:46](#)):

Well, but they be fair. I like the, "Click to schedule an appointment."

Greg ([24:50](#)):

Although it's too low.

STEPHEN OLIVER ([24:52](#)):

Yeah.

Greg ([24:52](#)):

It should be higher.

STEPHEN OLIVER ([24:53](#)):

Right.

Greg ([24:54](#)):

And it should have really been on the first page.

STEPHEN OLIVER ([24:57](#)):

Yeah, but to be fair, they have this, they also have-

Greg ([25:01](#)):

He's being nicer than me.

STEPHEN OLIVER ([25:02](#)):

They also have a chat bot.

Greg ([25:04](#)):

They do have a chat bot.

STEPHEN OLIVER ([25:06](#)):

Let's-

Greg ([25:07](#)):

It didn't pop up immediately, but let's see. Okay, that doesn't help much.

Greg ([25:14](#)):

Yeah, see the chat bot doesn't really, it just goes back to a form. What it should be, is a natural language chat bot. Those actually improve conversion rate. This type wouldn't, what this should be, is a form on the front page with some sort of gift, or offer, or report, like a free report of the top five ways to retire early.

STEPHEN OLIVER ([25:37](#)):

Yeah, let's just take a look generally at this page here. Now-

Greg ([25:41](#)):

We've got a lot of things to [crosstalk 00:25:43] over here.

STEPHEN OLIVER ([25:43](#)):

I look at all websites like they're an ad. If I was opening a magazine, I saw an ad, if I was in a newspaper, I saw an ad, if I was in any environment, a postcard you mail through the mail. You always want a compelling headline, and the headline is the ad for the ad. In other words, the headline is trying to get them to read the ad. If you look at this, what's the headline? Marks Wealth Management, their logo.

Greg ([26:15](#)):

And it's up there twice for some reason.

STEPHEN OLIVER ([26:17](#)):

Yeah. That's what I was saying next, is it's up on the top banner, it's down on the second banner. Then am I trying to solve a problem? Is my problem that I haven't met their team? Or is my problem that I'm trying to figure out how the new tax law affects my retirement portfolio? So you want a call out, and you may have heard us say this several times, but I always go back to the quote, "You want to get inside the conversation already going on in their head." You want to be like you're overhearing, surveilling the conversations they're having, stressed out over at the kitchen table, late at night. You want to have compelling emotional call to look at the rest of the material. The headline is never your name. And the conversation going on their head is, "Oh, I haven't met Marks Wealth Management team?"

STEPHEN OLIVER ([27:17](#)):

And see what we have a tendency to do, is we think somebody who shows up at our site is looking for us, which may or may not be true, and is ready to do business with us, which is usually not true, and is really just trying to learn about us. Well, I got to share something with you, nobody cares about you. They care about themselves. So they're not looking to learn about you. They're looking to solve a problem they perceive they have, answer a question that they have, find somebody who can give them support. Then you're looking to show them one, you can answer their questions. Two, you can help them, and three, that you're trustworthy. So then some of this stuff, it's not that it's not useful, it's in the wrong step.

Greg ([28:11](#)):

Right, it's in the wrong order. Like this information here, isn't bad. Oops. This information isn't bad. So these are the problems they're trying to solve, manage people's wealth, advise them on their portfolio, plan for their legacy. But it's down there and I've [crosstalk 00:28:28]-

STEPHEN OLIVER ([28:28](#)):

It's not terribly compelling in the way it's written-

Greg ([28:31](#)):

No.

STEPHEN OLIVER ([28:31](#)):

... but it's more [crosstalk 00:28:33]-

Greg ([28:32](#)):

And it's, "Learn more," so maybe I want to learn more about that. Now this is more of a brochure. So let's look at what they have. Still, I don't really know what to do. Now it's going to educate me. Maybe, I don't know, and then I'm going to have to, what am I going to do? I'm not really sure what to do yet. I'm still, maybe I go all the way down to the bottom and then this digs me in deeper. Oh, it just went to another section. So that's no, maybe, but still there's no what we call in marketing, a call to action. There's no real call to action here anywhere. So this would be, this needs to be fixed. Again, there's live email, [crosstalk 00:29:17]-

STEPHEN OLIVER ([29:17](#)):

Well, and let me reiterate what you said a minute ago, and define call to action, is if I'm a prospective client, and I'm a referral. I sat down with my best friend and I'm trying to solve a problem, or I'm lamenting my problems. And they say, "Oh, you should talk to Marks Wealth Management. I work with them. I love them." Great, now the keyword was in all likelihood Marks Wealth Management, and they were actively searching for you. Then once we get there, you're right, in most of the sites we say, what would you say? 90% of the sites, then you're right, is they want to learn who you are, and they want to make an appointment because all the other steps have been taken.

STEPHEN OLIVER ([30:04](#)):

But if you're doing search engine or pay-per-click, and you're probably doing a landing page for pay-per-click, which we'll talk about it in a different segment. But if you're doing search, and they land on your

site, then all of your assumptions about what it is they're looking for, are wrong. They searched, "IRA rollover," they searched, "Retirement planning," or they researched, "Biden tax law impacts on," whatever keywords they're going to use. Then if they end up here, "Well, what the hell do I care about meeting your team? I want to learn about answering my question." And that's what you're talking about, call to action, is think about there being more than, but at least two steps that are important in any reaction that's cold. Step number one is to capture some information, proactively follow up, and educate. Step number two is convert that to an appointment that then hopefully converts to a new client.

STEPHEN OLIVER ([31:06](#)):

What we do too many times is we skip a step. We go straight to, "Oh, they want to make an appointment with me, that's why they showed up on my site." And we go straight to the appointment setting without realizing that most people who get there from Google are doing research. They're not actively seeking you out. They're, and most cases, they don't think of themselves being an active buyer. They don't think of themselves as immediately looking to hire somebody to do it for them. They're just trying to do research, figure out a little bit more and figure out what the solutions are. So that's why the call to action should always include, "Schedule an appointment," but not just include, "Schedule an appointment." It should be, "Here's a free white paper. Here's a free report. Here's a free video. Register for our webinar, attend our live seminar." It could be all of those things.

Greg ([31:58](#)):

You could have all those options.

STEPHEN OLIVER ([31:59](#)):

Yeah. But all of them get them to give you information about them, give them the next step of information. Again, I can put all this information on the site, but really what I want to do, is get their contact information and start following up. So that's why I want to have what I would call, "Bait." I would want to have some incentive for them to give me the contact information, so that they get that information.

Greg ([32:28](#)):

Well, and somebody might make the case, if whoever's building the website for him might make the case, "Oh, but they need to do research first, and then they'll make a decision." Well that, it's not wrong. They may be doing research, but when they do make the decision, they need to immediately be able to respond. In this case, when are they going to respond? Maybe I've made my decision now, I need to be able to respond. Maybe I've made my decision here, I need to be able to respond. But I can't. I have to dig around to be able to respond. You always have to make the assumption that the page will get abandoned if they can't respond at that moment. So there's two pieces there. One is, as [Steve's 00:33:10] saying, that they need a soft, instead of going right to an appointment, it's like, what's the example we use. It's like going on your first [crosstalk 00:33:20]-

STEPHEN OLIVER ([33:20](#)):

First date and asking them to marry you.

Greg ([33:21](#)):

... asking them to marry you. You-

STEPHEN OLIVER ([33:23](#)):

Bring an engagement ring, and if you have a good time, ask them to marry you.

Greg ([33:28](#)):

Yeah, exactly. It's too abrupt, because an appointment is a big commitment. They need some other thing. Now it doesn't mean you couldn't have on your website, and in multiple places, "Schedule an appointment," because they may be ready. I mean, if this was a referral, if I land on this, and I knew this, I got referred to this guy, it's totally okay. There's a phone number. They can call. If I was referred to him, and I'm ready, then yeah, there should be a phone number right there. So I could call the guy and schedule an appointment. No problem. But there's also other steps along the way that I can take. Maybe somebody does go on a first date and they get married that day. Not a good idea, but-

STEPHEN OLIVER ([34:07](#)):

Speaking from experience?

Greg ([34:08](#)):

No, that's not me. But anyway,

STEPHEN OLIVER ([34:11](#)):

Anyway, well-

Greg ([34:13](#)):

[crosstalk 00:34:13]

STEPHEN OLIVER ([34:12](#)):

... let's summarize where we're where we're at so far. And we can do that in another segment, how's that? The first thing we started with, is Google search. A key point to always remember, is you want to, and there are tools to do this, it's very easy nowadays. You can find out what people are really searching for, and Google, when you're buying pay-per-click, AdWords, they'll suggest keyword for you. But what you want to do, is you want to come up with the list, and we can provide this for you. But you want to come up with a list of a 100, 200, whatever various iterations they are. I don't have it in front of me, but we have it for you. Look at the list of keywords that people are likely to search for, and then you want to go to work on how is this going to show up in Google? That's the content strategy. At the same time-

Greg ([35:08](#)):

To build out the content, the blogs, and the podcasts and everything else, that's the content that you're going to put in the website.

STEPHEN OLIVER ([35:12](#)):

Yeah. Because if they search, "IRA Rollover," you want a lot of content about IRA, right?

Greg ([35:16](#)):

So you show up and the search engines above other people.

STEPHEN OLIVER ([35:19](#)):

Exactly, but then you want to make sure you, at the same time, go through and are buying pay-per-click, it's some of the best investment you can make. Because if you have somebody who's actively looking, you want to make sure you're showing up in Google Local. You want to go through and do the verification process for financial planners, because then they're showing you up really high, because that's important. And go through those steps. Then when somebody gets to the website, think about it as just like somebody calls your office and starts asking questions. Your mission on somebody calls into your office and starts asking questions, wouldn't be answer every question, wouldn't be to have an hour and a half conversation about their effective retirement planning, on a cold incoming call.

STEPHEN OLIVER ([36:08](#)):

We all know what that would be, is it would be qualify, answer questions enough to have them feel comfortable, make an appointment to meet in person, by phone, or by Zoom to do a discovery meeting and to learn more. But the website is the same. So many people confuse what I would call brochureware with the mission. The mission is to capture information and then make an appointment. Typically it's in that order, capture information, then make an appointment. And not just have, "Make an appointment or nothing." And so you want those steps. But what we'll do some more analysis, give you a lot more depth in a different segment.

Greg ([36:51](#)):

All right. Sounds good. Thanks everybody.

STEPHEN OLIVER ([36:53](#)):

Thank you.

Greg ([36:53](#)):

We'll see you next time.