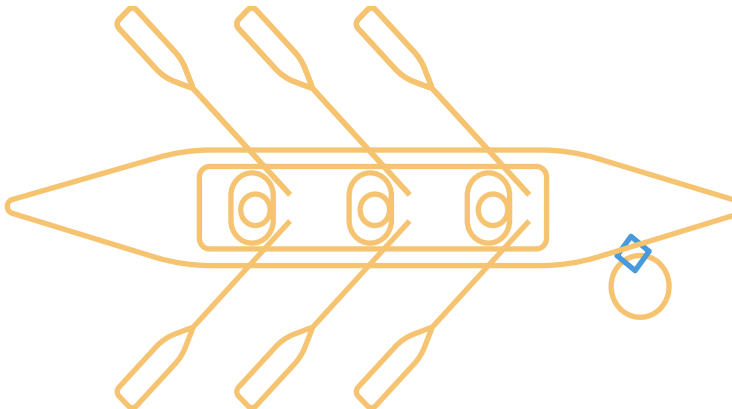




Growth360°

# Attract New Clients Through Your Brand and Value Proposition

Use this guide to better understand the importance of defining a strong brand to reach new clients and strengthen relationships with existing clients.



Your brand identifies your company as financial professionals who clients want to trust and work with. In this guide, you'll learn what a strong brand is, why different elements of your brand are important and how they work to help you attract new clients while creating and maintaining positive relationships with your existing clients.

## Table of Contents

<b>What is a Brand?</b>	<b>1</b>
<b>Why Your Brand is Important</b>	<b>1</b>
<b>Vision and Mission Statements</b>	<b>2</b>
<b>Core Values</b>	<b>2</b>
<b>Positioning Statement</b>	<b>3</b>
<b>Services and Benefits</b>	<b>3</b>
<b>Defining Your Target Audience</b>	<b>4</b>
<b>Growth360: Branding Overview</b>	<b>5</b>
<b>MarketingCentral by Cetera</b>	<b>6</b>
<b>Additional Branding Resources</b>	<b>6</b>

# What is a Brand?

Before we discuss why a brand is important, let's first define what a brand is. A company's brand conveys who the company is and what the company stands for. You might think your company's logo is your brand, and you are correct. Your logo is a part of your brand, but it's not the only part. Your brand is every single interaction that a person has where they identify you or your team in the work that you perform.

Pieces of your brand can include your name, building, brochures, anything with your logo, even you personally and how your team acts in and out of the office. A successful brand introduces the company and attracts the right kind of client for the company.

Prior to making any large decisions or alternations to your brand, you have to first identify and define your target audience.



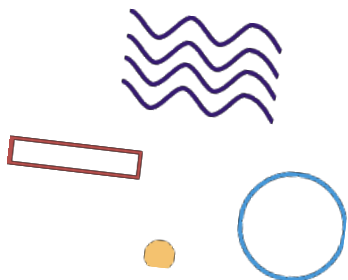
## Why Your Brand is Important

If someone asked one of your current clients about your brand, what do you think they would say? Would they have a clear idea of who you are as a company, or who you are as financial professionals?

Having a clear and consistent brand is an essential aspect of your company. When someone hears your company's brand or name, they should have a sound idea of not just what you do, but how you conduct yourselves and what your purpose is.

The more current and prospective clients see and experience consistent brand and marketing messaging, the more they'll remember you and want to share your message.

How your clients feel and what they experience when they interact with your company is another key aspect of your brand. Do they feel cared for and heard after a meeting with you? Do they believe you can help them achieve their financial goals? More than words on paper, your brand should reinforce the feelings you want your clients to have as they begin to trust you and build a relationship with your company.



**43% of consumers choose brands they're loyal to over others in the same industry.<sup>1</sup>**

<sup>1</sup><https://www.fundera.com/resources/brand-loyalty-statistics>

# Vision and Mission Statements

## Vision Statement

A vision statement is a short description of your organization's future goals, aspirations and the wider impact you want to have on your community and the world.

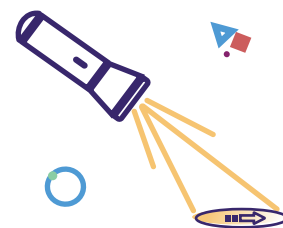
Your vision statement should communicate the purpose of your firm and the goals for your organization's future. It also helps provide guidance for any decisions the company makes. You can ask yourselves, "Does this align with our vision statement and the hope we have for the future of this company?"

## Mission Statement

Your mission statement defines the company's business today, your objectives and the approach you'll take to reach your vision's objectives. By understanding where you are today you can create more realistic goals for your company to abide by, your mission statement is the foundation for your organization.

A mission statement may or may not be known to your clients or prospects but it should guide your current and future employee's actions as part of the company.

Both the vision and mission statements should be composed so they can be used internally and shared with clients and prospects.



## What's The Difference?

These two are very similar, so here's a simplified way of thinking about them:

Your vision says what you want for your clients in the future.

Mission says what you're going to do to get there. The mission statement should bring to life your vision.

# Core Values

Your core values are essentially behaviors – behaviors you want to see in your own organization and want others to hold you accountable to. The core values are non-negotiable. When you say certain behaviors are within your values, you have to stick by them. When you show your employees, fellow financial professionals, future clients and current clients what you believe in, you can create a sense of community and authenticity.

People want to work with and for companies that have the same values as they do. They will stay loyal to those companies who put those shared beliefs on display.

When you're creating your core values, write them from a place of honesty and authenticity. Clients will be able to tell when you're just saying what they want to hear. These values are helping improve your brand loyalty and relationships – make sure you're building on a solid foundation.

**As much as 89% of consumers relate to brands that share the same values as them.<sup>2</sup>**

<sup>2</sup><https://www.fundera.com/resources/brand-loyalty-statistics>

# Positioning Statement

Your positioning statement or personal branding is your elevator pitch. It explains what makes your firm different from other firms and why yours is better.

Through these one or two sentences, you need to create a mental picture of your brand's unique attributes and strengths.

This should answer the question, "Why should someone trust your company with their assets?"

This statement is also used to align your brand messaging so it's consistent across every platform including all your social media accounts, your website, brochures, sales messaging, etc. Use your positioning statement to discuss your services, who would benefit from using them and how it fills a client's needs better than other financial firms.

## Fill-in-the-blank Positioning Statement

For \_\_\_\_\_, \_\_\_\_\_ is a \_\_\_\_\_ who's \_\_\_\_\_ so people can, \_\_\_\_\_  
target audience      your firm      business category      unique / key differentiator      key benefit to client  
because \_\_\_\_\_ .  
reason to believe

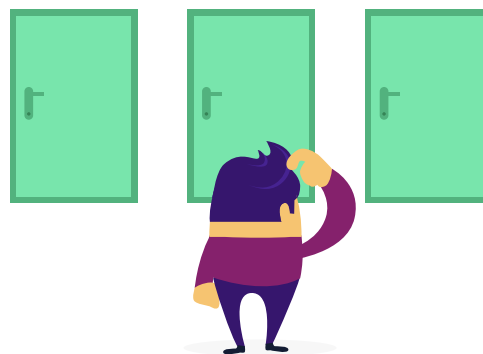
# Services and Benefits

Brand messaging starts with what services you offer, but it builds to a value proposition. The value is what ultimately helps the client or prospect make a decision. "Is this valuable to me?"

Personalizing and tailoring your value proposition for each client provides more information about how your company can benefit each new client.

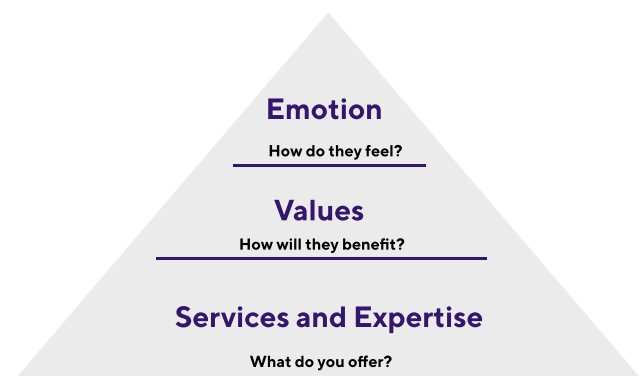
We know you don't take these topics lightly. You want what's best for your client. So remember, when you're discussing your services with a client, you aren't just talking about the services you offer. You're talking about their future, what their retirement could look like, whether they can afford a new car or if they can pay for college for their kids.

Mapping your services, values, and emotions in the mountain chart on the right. Emotions are usually the key driver in any decision and aligning your services to an emotion, like safety or confidence, can help you help your clients.



## Writing Your Personal Branding

- Look at positioning statements from companies you admire.
- Write with empathy in mind.
- Keep it brief.
- Have your core values in mind when you write it.
- Remember your audience.
- Be authentic.



**Map your services and offerings to emotions to help your prospects and clients make decisions.**

# Defining Your Target Audience

You can't reach every market at once. While your company likely can serve many types of people, it's ideal to identify the group you best serve – your target audience. In a perfect world, everyone in your company should agree about who your target audience is. You'll have clients who are outliers, but focusing your brand presence and messaging can help you attract the right audience.

Not sure who your target audience is? Use these steps to help narrow it down.

## Identify Your Target Audience

1. Create the ideal client profile. Include information like age, income level, life stage, etc.
2. Learn about client habits. What does your ideal client want?
3. Consider your services. Who is using the type of services you already offer? Who else could use your services?
4. How do you stand out from your competitors?

Once you know who your ideal clients are and who your target audience is, you can build brand messaging and marketing messaging that draws them in. Focus the majority of your marketing efforts on this group of people while still considering other prospective clients who might not fit into this ideal client profile.

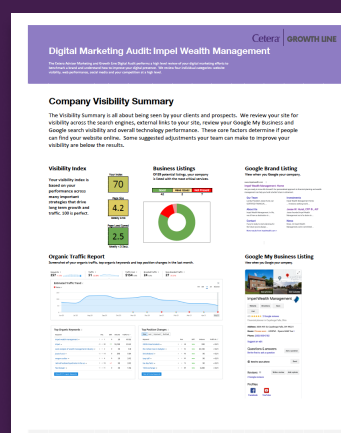
If you can, find a niche group where you can establish your business to get more exposure and benefit from a built-in referral network.

And once you start working with your target audience, word-of-mouth marketing can spread and new clients can start sharing their experiences with you and send prospective clients your way. When you build your brand effectively and authentically, your clients will notice.

## How is Your Brand Stacking Up Online?

Click here to get a free digital audit of your firm's online presence. Is your website turning away clients? Are you posting enough in social media? Get a free report and 30-minute review session.

[GET A FREE AUDIT](#)



# Growth360°

## Branding Overview



Creating and having a company brand is a great tool for reaching a larger audience while providing the resources and information your clients need where they're already comfortable. MarketingCentral, Cetera's digital marketing platform, can help support your branding efforts and make creating a personal brand easier.

Use the stages below to assess where you are today and find new opportunities for growth.

### Visible

Success at the first level is about having the basics down and making sure your brand is established. Of course your company should have your logo created, your ideal target audience identified, your mission and vision statements created, your core values outlined and your positioning statement in place. These pieces of a company's brand should be clear to existing and potential clients through your company's actions and messaging.

### Active

Success at the second level is about using MarketingCentral automations to expand and strengthen your brand. Success also looks like ensuring anyone who interacts with your company knows what the services are and what the value is through consistent messaging across all communications.

### Optimized

The third level is about ensuring your company's brand is optimized and you are building trusting and loyal relationships with clients through honesty and authenticity. Potential clients should also be able to recognize the brand and the company and know what you and your employees stand for.

# MarketingCentral by Cetera

Build a strategy for growth with MarketingCentral, a powerful suite of tools built exclusively for you by the Cetera Marketing team. MarketingCentral is a comprehensive multi-channel platform with pre-approved email templates, social media content, downloadable event kits, presentations and so much more that you can fully customize to meet your business and client needs. Take the guesswork out of marketing and focus on growing your business.



Learn more at <https://fmgsuite.com/marketingcentral/experience/cetera-resources/>



## QuickStart Guide

Get up and running with this step-by-step guide to MarketingCentral.



## Interactive Webinars

Register for an interactive webinar to learn more about the MarketingCentral tools and get assistance with any questions.



## Marketing Strategy & Best Practices

Put together a solid client and prospect outreach strategy designed to get results with the help of this straightforward guide.



## MarketingCentral Automations

Explore opportunities to automate marketing communications across email, social and print.



## Growth Guides

Drive leads and increase prospect conversion rate with these Client Prospecting and Conversion Guides.



## Events Guide

Leverage MarketingCentral and these tips to plan, manage and promote your next client or prospect event.



## 2021 Marketing Calendar Template

Plan the next year of marketing content and strategy with this calendar template.



## Required Record Retention

MarketingCentral is an approved record retention tool.



## Using MarketingCentral as a Team

Use these tips to personalize a profile if you are using MarketingCentral as an ensemble team or program.

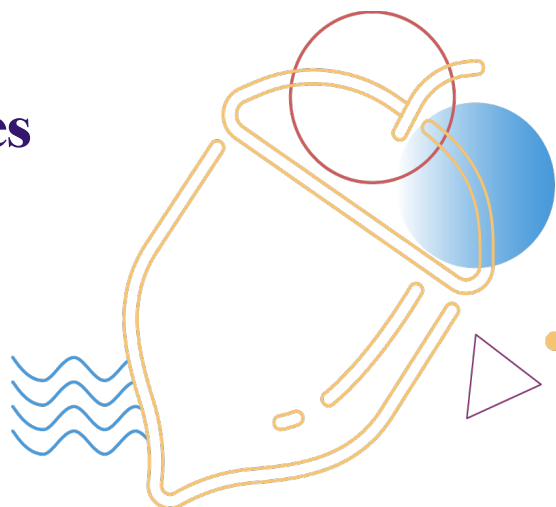
## Additional Branding Resources

[Marketing Strategies and Best Practices](#)

[Client Prospecting Guide](#)

[Brace Yourself About Us](#)

[Pershing Advisor Value Prop Words that Work](#)



'Cetera Financial Group' refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members FINRA/SIPC. Located at 200 N. Pacific Coast Highway, Suite 1200, El Segundo, CA 90245-5670. Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.