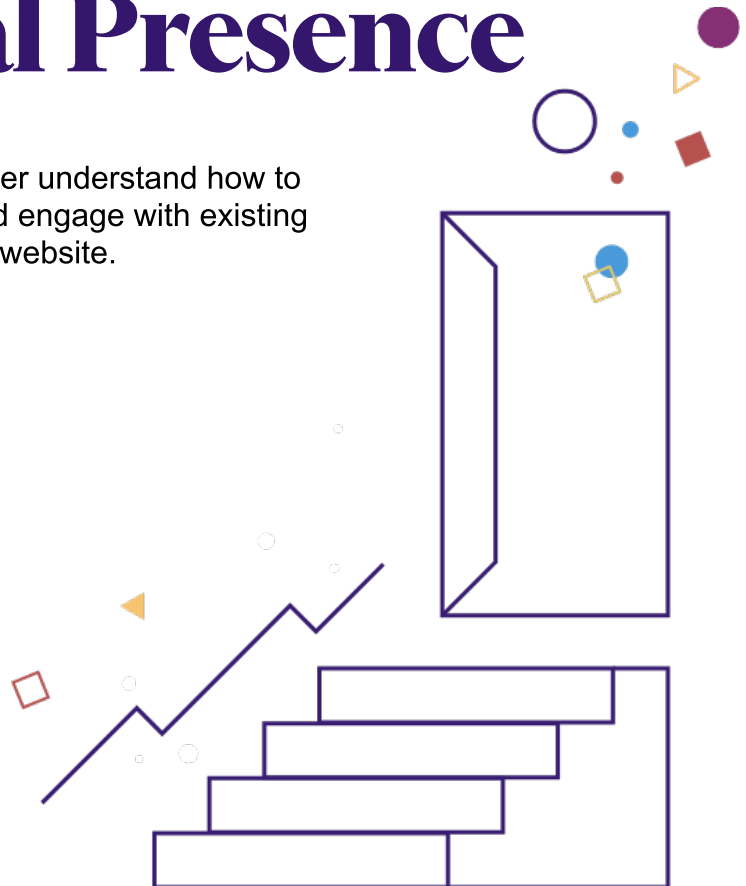




Growth360°

Optimize Your Website to Strengthen Your Digital Presence

Use this guide to better understand how to reach new clients and engage with existing clients on your firm's website.



As more people use online resources to find companies they want to work with, it's critical to have an effective website and online presence. In this guide, you'll learn why your website is one of your best resources for attracting prospective clients and retaining current ones.

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The Importance of a Website

Researching and purchasing products and services is becoming increasingly digital.

Your current and potential clients want to see your presence online. They are comparing you against the competition and want to see that you're established and have credibility.



75%

of consumers admit to making judgments on a company's credibility based on the company's website design.¹

57%

of internet users say they won't recommend a business with a poorly designed website on mobile.²

88%

of online consumers are less likely to return to a site after a bad experience.³

Your Website Must Serve Many Different Audiences

Your website introduces new people to your business, and provides clients with a connection to both their accounts and your brand. It facilitates relationships that could last a lifetime. To gain a visitor's attention, your company website needs to be technically sound and load quickly. Each page must be clear and concise, with all the information necessary to convert an anonymous browser to someone you can contact later.

Current Clients

These are your most important visitors. They want to easily access their accounts and feel good about their decision to work with you.

Future Clients

Prospective clients are usually going to come to your website to research your firm. If they don't like what they see, you will never know they were there. A good first impression is everything.

Recruiting Your Team

Future employees or other professionals will visit your site to get a feel for you and your approach. A solid brand interaction will help you recruit top talent and partnerships.

¹<https://www.sweor.com/firstimpressions>

²<https://www.sweor.com/firstimpressions>

³<https://www.sweor.com/firstimpressions>

Guiding Visitors in the Right Direction

Your website should be designed and built to guide your visitors to the most important elements first. Most visitors to financial firm websites will visit the team page, so have a link in the navigation and in a prominent space on the homepage. A good website will blend what visitors want with what the firm wants them to know.

Key Website Goals

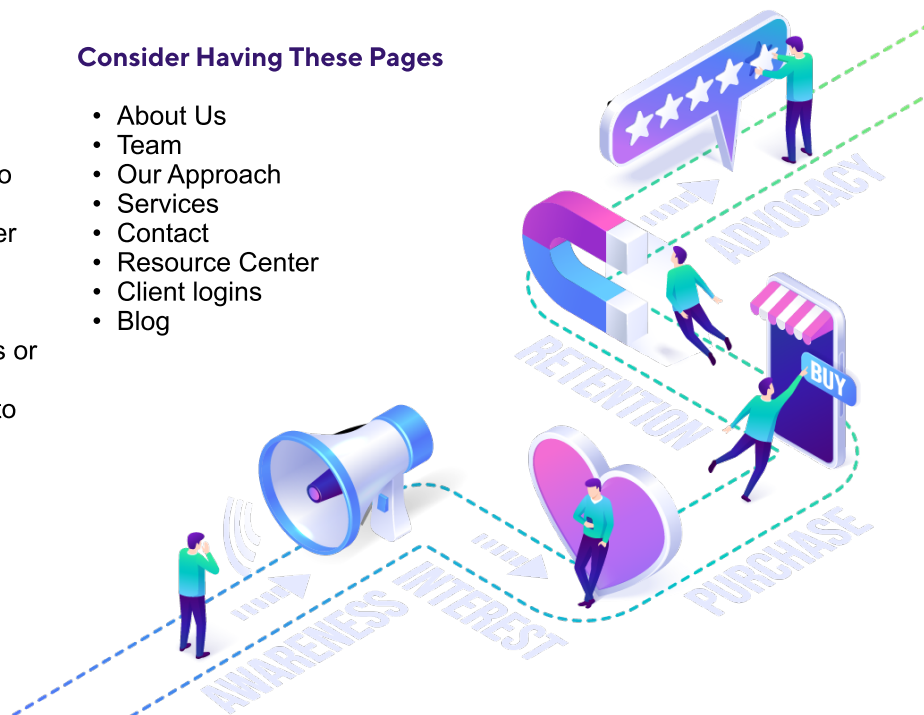
- Build credibility with good team photos and profiles
- Share your philosophy and approach to investing
- Showcase your firm as a thought leader with an automated or custom blog
- Help people access their money with prominent links to client login areas
- Educate with resources like calculators or videos
- Gather leads with tools like Riskalyze to grow your business

Company Must-Haves

- Your team bios
- Core values
- Mission statement
- About your company

Consider Having These Pages

- About Us
- Team
- Our Approach
- Services
- Contact
- Resource Center
- Client logins
- Blog



Ongoing Adjustments Help Drive Growth

There is certainly an initial and ongoing time investment when running a healthy website. Creating all the copy, finding the right design and updating the website can take time.

Website Automation

Through MarketingCentral, you can find customizable content and resources to enhance your website beyond basic company information. Find resources like:

- Calculators
- Blog posts
- Presentations
- Infographics
- Web articles
- Whitepapers

Regular Website Maintenance

- Ensure images and text are loading quickly
- Update relevant information
- Fix broken pages
- Add any pages you think are missing
- Make improvements based on visitor feedback

Making Your Website Search-Engine Friendly

Make sure your potential clients can find your company and your website through search engine optimization (SEO). By following best practices and creating custom content, you can capture your audience's attention and create a more successful website.

Follow Best Practices

When you're setting up your website or making regular updates to the copy and pages, consider SEO.

SEO strategies can help you rank higher on search engine result pages and therefore help new people find your business.

- Make sure your site is indexable by Google
- Your site must have a sitemap
- Make sure your URL starts with HTTPS
- Use properly sized images under 300kb

Create Original Content

There's no one quite like you and no business that offers exactly what your business offers. We recommend that your website reflect that, as well. With original messaging and custom website content, your clients and people who visit your website can get a clear picture of who you are as a business and as a team.

A few examples of this original messaging could include company newsletters, employee spotlights or articles written by you. These types of articles and blogs can also help you set your website apart from the competition and help you rank on search engines.

Success and Growth

The metrics and measurements of a successful website will depend on your company and your needs. What's most important to you?

Defining Success

Having a successful website is about helping your clients gain more information, whether that's about your services or your company overall.

Success may look like:

- Positive client feedback
- Increased website traffic
- More leads turning to clients
- Company growth

Gathering Leads

Having successful growth from your website is about being able to convert visitors into leads. One of the key tools in the MarketingCentral program is Riskalyze. Website visitors are given a view of their risk profiles in exchange for their private information. Webinars and events are another great way to gather leads from your site. A healthy website should collect 1-3% of the traffic into leads that can be contacted for new business. Knowing your numbers is key.

Three Keys to Maintaining an Amazing Website

When it comes to websites, most people get hung up on the look and feel. The look and feel are important, but below are three core ideas that will help keep your website exceptional and relevant.

Update Your Website

Keep your website copy updated and relevant using your own content and the information available in MarketingCentral. Include high-quality employee photos where appropriate.

Use CTAs to Drive Next Steps

Use calls to action to get visitors to take the action you desire. Use more descriptive language than simply “Click Here” and “Learn More.”

Keep Navigation Simple

Your website should have no more than 4 to 7 items in your main menu. Even as you update your website, carefully curate the content you think is the most important.

Website Compliance Safeguards

Staying compliant is vital to protect you and your company’s reputations. Take care to avoid language on your website that sounds promissory or misleading. Use clear, accessible language on every page. These quick steps can help you establish a system of checks within your firm.

5 Simple Steps to Safeguard Your Firm

1. Learn about the risks: talk with your legal or compliance department. Review Cetera’s policies and take the training courses in the SmartWorks Learning Center.
2. Get clear guidelines on how and where you should use specific language. What kind of language do you need to avoid? What disclosures are needed and where should they appear?
3. Establish guidelines for reviewing materials and set up approval hierarchies. Make sure your whole team is aware of these protocols.
4. Verify your digital marketing content has all the required disclosures.
5. Whether it’s you personally, your compliance officer or a trusted vendor, make sure that someone is watching for errors and the correct changes are made before the content goes public.



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Website Overview

Creating and having a company website 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 website efforts and make updating content easier.

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

Visible

Success at the first level is all about being present online. Your firm should have a website with copy specific to your industry. It should grab your audience's attention, whether that's your existing clients, potential clients or potential employees. The website must also have basic information about the company and services offered, contact information and links for clients to access their accounts.

Active

Success at the second level is about making sure the website is working well and helping the company grow. Ideally, after visiting the website, people know what their next steps should be and use the available tools and resources. It's also important that the website provides a positive experience and value-add information (like MarketingCentral content) for the users.

Optimized

The third level is about optimizing the company's website to support additional growth. This can include updating website information as needed and writing original content for the website. Search engine optimization (SEO) can also be considered to increase website traffic.

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.

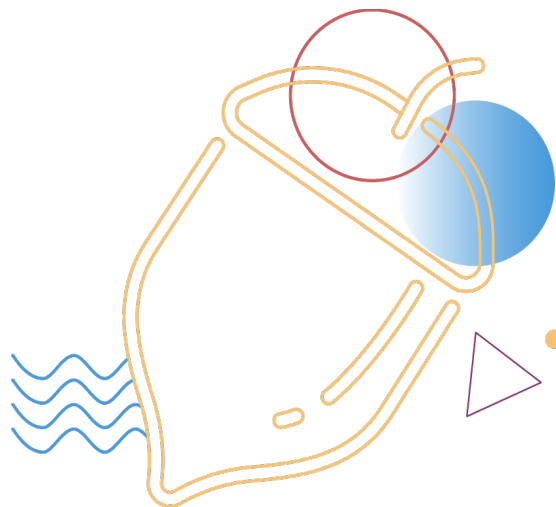
Additional Website Resources

[MarketingCentral - Growth Guide](#)

[AdviceWorks - Growth Guide](#)

[Riskalyze Starter](#)

[Prospecting Essentials](#)



'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.