

WHITE PAPER

Optimized 2021 Marketing Strategy for Investment Management Services

As technology and markets have endured the 2020 rollercoaster, we've seen unprecedented disruptions stemming from a pandemic shutdown and social unrest on top of the seasonal raging wildfires and hurricanes. According to Forrester, such environmental, social and governance (ESG) concerns have become pressing client concerns, leaving financial firms a full plate.

Investors and asset managers alike are seeking out stability via increased reliance on digital investment tools like Broadridge, as well as from marketing tools that tap emerging data and machine-learned capabilities. Furthermore, a lack of a digital marketing finesse coupled with a scarcity of original messaging can quickly become a deadly cocktail in 2021.

As Mike Liwski, Zero Company's Director of Strategic Performance, puts it, "Marketers in this industry, advisors and investment managers are now plagued with some harsh new challenges, including having to do more with less budget. The current environment has dramatically fast-forwarded the need to incorporate and master digital marketing."

With all this chaos happening in the background, one clear path forward for investment management firms shines like a beacon in the darkness:

Focus on the prize by using a 360° optimized digital marketing strategy for the 2020s

Steps to Cut Through the Asset Management Noise in 2021:

1. Secure your organic foundation

Increase your emphasis and attention to what is trending

2. Combine relevant messaging with smarter SEO

Optimize content to capture brief attention spans

3. Bolster your consulting presence with the right paid ads

Focus on building a quality audience

4. Embrace a sustainable, consistent social media marketing approach

Focus your strategy and tactics on each platform

5. Open up the content strategy

Leverage experts and partners for content

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Steps to Cut Through the Asset Management Noise in 2021



Investment management services firms in 2021 will need to optimize digital channels to synchronize and push one single campaign objective at a time with laser precision, cross-channel coordination and speed before moving on to the next. You'll need to understand these digital channels better and speak to the new normal of investor priorities. This will become an approach to adopt throughout your campaigns, as we'll see below.

Let's look at the actual steps you can take to cut through the noise in 2021 and grab more business.

1

Secure your organic foundation

Research SEO keywords against trends.

Part of what distinguishes the 2020s is increased emphasis and attention to trending hashtags (often simply keyword mentions). Without employing these directly in this news cycle economy, you're lost in the woods. This is why you need the best, most inclusive and varied keyword research tools and the knowledge to go with it.

One of the best such tools is [SEMrush](#), which includes not just Google's big data sets, but just about everyone else's that matters. In addition, there are trending keywords and topics by the core keyword phrase or industry. So, if you're looking for the topic that is hot right now, using the exact wording, you'll find it there. Google's own data is included, so don't worry that you'll be excluding the key source, because you won't.

Lean into the trends side of the equation

Trends are coming largely from four key sources for B2B and finance in general. You need to be able to draw insights from mentions across the mainstream social media and search spectrum to stay on top of indirect investor sentiment. By segmenting mentions according to customer profiles, these sentiments can help to formulate messaging in more relevant and original ways with reference to competitors in the background.



Twitter has become a bellwether for overall social media and news-gearred trending terms as the platform has matured. It's also the place to see customer service in action. Make those silent eavesdroppers confident in your company's CS ethic.



Google search is central for search trends, but must be parsed to account for the way some trends persist while others fizzle.



Facebook may not have the glamour of Twitter or Instagram, but it's where everyone lives. Think of Facebook as a more in-depth form of Twitter without the prestige or PR. People are being 100% real on Facebook as a rule, or at least the most real they ever get on social media.



LinkedIn is the B2B networking equivalent of Twitter. With this in mind, the trends are industry-focused. There is also a sizable percentage of investors saying bluntly what they feel about market trends and how it impacts their outlook. A B2C group focused on investing is likely to have more followers if the group's name is focused on popular investor concerns. Find ways to collect and incorporate the groups and keywords they frequent.

2

Combine stronger, 2020s-relevant messaging with smarter SEO

At this stage, you have your keywords and trends universe in line. From here, you'll need to incorporate them into your content in the most productive way, without investing your time and resources in long-term ways of capitalizing on the momentary trends. Think short-form content:

- ▶ **News posts**
- ▶ **Brief blog posts**
- ▶ **Brief videos**
- ▶ **Social media updates**

While the first of these three allow for some depth and breadth, the update is also a content form in its own right when done correctly. Use news, blog posts and videos to capture brief attention spans that are essentially surfing trends anyway. Link to longer-form content from here. Use social media posts not just to advertise these, but to incite a riot of participation.

Without strongly stated, visible and engaging opinions, investor audiences won't act.

It's because an opinion is strong and distinguishable from the common wisdom that it becomes of interest and of use. Investors are seeking voices that stand out from the background. Be that voice! And be brief enough to surf the trends successfully, reaping what you can from surface interest and staying abreast of the total trending keyword universe.



Optimize all digital assets on and off-site

One of the worst mistakes investment firms make is to take the cookie-cutter approach to SEO. The truth is that most are doing it wrong. They adopt best practices but don't adapt them to their own core audience needs or their own organizational business model. So how do you do this?

Once you are able to get accurate at targeting investor's true concerns, investigate the trends and related keyword direction from your keyword research tool. Then create content focused on the brief news cycle and optimize for the trending terms you know they care about most right now.

Poll your audience (email list, push notifications, etc)

Millennials are driving both voice and image-originated search. According to Gartner, by 2021, most website redesigns by early adopter brands that support visual and voice search will increase digital commerce revenue by a whopping 30%.

Optimize on message for voice + image search

Image search optimization

Alt text should address the visual image as well as reference the topic without breaking rules on accessibility. To be safe, you should also be naming your files logically and avoiding duplication where possible -- "image X 13" is not as good a strategy as "Alternative Investment Portfolio". Moz provides a few more specifics on the Alt Tags for Images topic.

Voice search optimization

Main keywords as well as synonyms should always be employed in structured data and in audio and video transcripts as well as metadata and other aspects of the voice layer of your site's content.

"Use news, blog posts and videos to capture brief attention spans that are essentially surfing trends anyway."

3

Bolster your consulting presence with the *right* paid ads

Google is your starting point

Leveraging Google Ads with precision is not easy or cheap. But it's the place where you will pivot from search ads to retargeting for already-exposed prospects ready to buy later. This makes Google Ads a foundation, not a final level of paid advertising campaigns. Order into meaningful ad groups based on core business services with search volume and competition, even if you seek to capitalize on the longtail versions that represent your featured sub-niche. Understanding Google's paid search platform can help in understanding how it displays YouTube and other sister company platforms in web results.

Do your biggest paid search investment on Google Ads, followed by experimental budgets and narrow keyword group focus on Yahoo and Bing based on your Google experience. It's key that you don't waste time and energy trying to "customize" for Yahoo and Bing until you've first got an entire keyword group performing at a high overall CPA (cost per acquisition) on Google's platform. Retargeting should be

built on the back of existing insights of your Google campaign, on Google.

If you're aiming at US users abroad (which you should), get acquainted with what Americans use in Japan, China, South Korea and Russia, because it's not Google.

Social ad strategy

Be visible, quick and human is the rule of thumb here. For Twitter and LinkedIn, "follow" ads can be used to suggest following your asset management brand channel for certain topics. Twitter ads can show off your thought leadership content, opinion pieces and case studies to people searching or interested in your category keywords. YouTube is perfect for customer spotlights and topic series you can speak to in-depth.

Focus on building a quality audience of real followers you can rope into your funnel via email and web/push-notifications, opt-in and on-point, consistent, original, 2020s-relevant brand messaging.

4

Embrace a sustainable, consistent social media marketing approach

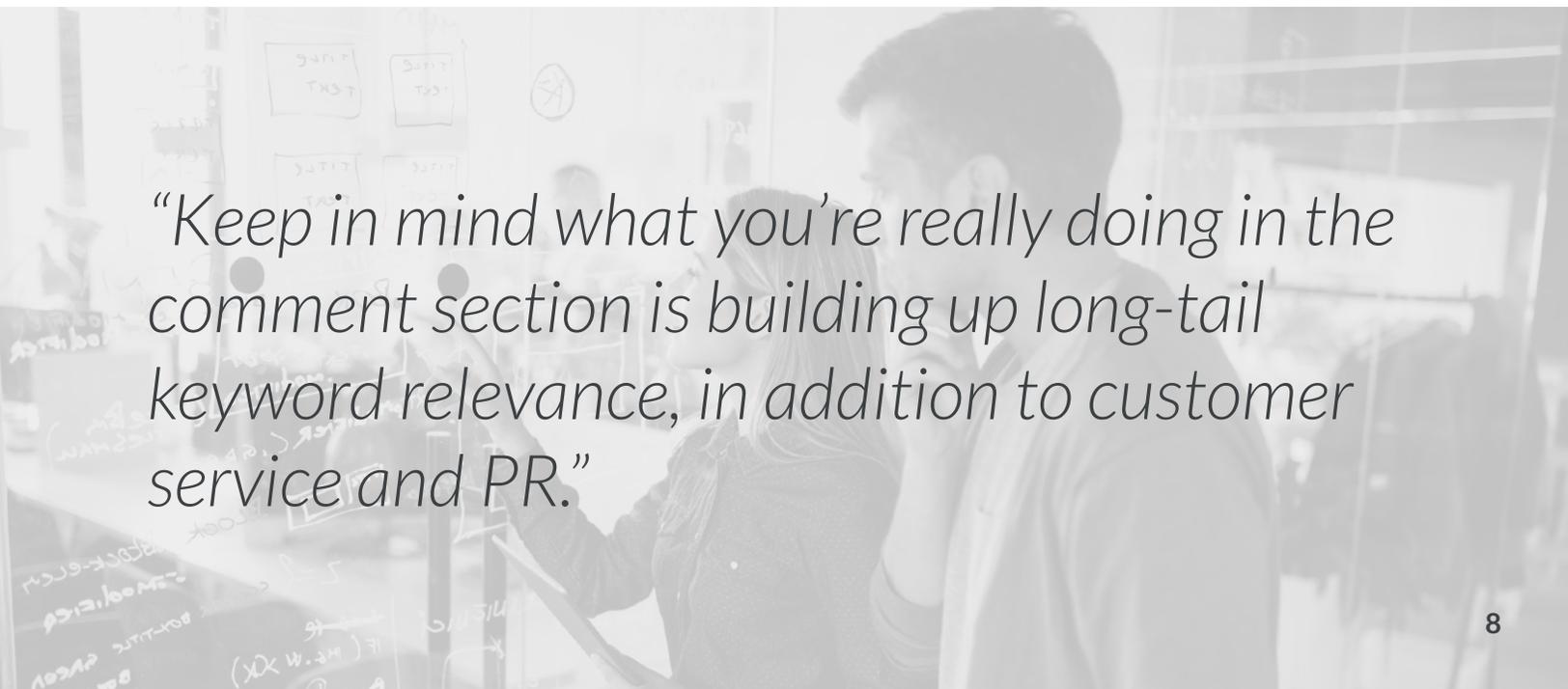
Now that you've got your trending keywords and topics for content, let's see how they can be used to best effect on social platforms. Here, we'll want to focus on your social media strategy and a few tactics on each platform that work most reliably.

Develop modular, multi-purpose content

Social proof videos will be able to address multiple swaths of demographics and plans in many cases. Not all, but some. By focusing on making more plug-and-play video topic modules instead of massive all-

purpose videos, you'll be able to use them to form YouTube funnels based on what you want to view or according to what is most keyword relevant.

Use your YouTube videos on your website by embedding them with transcripts or in a revised summary format. This is an instant way to reuse videos for more SEO power without misusing them or becoming a manual audit/penalty target. Social proof videos will be able to address multiple swathes of demographics and investment plans in many cases.



“Keep in mind what you're really doing in the comment section is building up long-tail keyword relevance, in addition to customer service and PR.”



Tap industry experts visibly on social media

By incorporating experts, you can tell your story better and with more authority. Topic experts pulled right from leadership roles within the organization, allow you to speak directly to hot concerns and avoid boring your audience.



Your topic expert can post brief posts or case studies that speak to the trends on LinkedIn. Then respond to comments selectively from that profile. Reach out via mentions monitoring to find and contribute meaningfully, if cautiously, on larger LI conversations already afoot. Let readers discover the post on the profile, don't beat them over the head. The curious will peek without prompting.



Topic experts can do well on Twitter by briefly stoking real conversations on their top projects and networking to get support from adjacent niche figures and associates.



YouTube videos can be from a topic expert who appears directly in the video. Since YouTube is similar to the old TV format in some ways, a fireside chat one-on-one is the best angle. Speak to an individual, not to a group. Address the problem-resolution part of your funnel here. Visibility depends upon views. Social proof participation depends on the launch.

Your customers' well-being is the focus here

Whether on LinkedIn, Twitter, Facebook, Instagram or YouTube, you can't afford to pass up the opportunity to help customers to have something public to like for your organic content and paid campaigns. But be aware that ad resentment is higher on social media platforms, so stick to substance.

Keep in mind what you're really doing in the comment section is building up long-tail keyword relevance, in addition to customer service and PR. Focus on the latter while your SEO or content strategist focuses on creating the potential for the former in the topic-planning and the angle/format. A poll is one way to stoke some involvement from a stiff crowd while also getting real customer insights. These hacks work great across the social platform gamut.

Purpose-driven video content marketing program

Special attention is due to the video content format. This is because of the shortening attention span of the average web 3.0 user. Multipurpose videos that plug and play with and across all of your content types are ideal. But here are some tips to make it a success story in your outreach to prospective investors.



5

Open up the content strategy

Now that we have a lean/hardened approach in view, rope in the following content angels for more punch and self-generating support in your messaging iterations:

- ▶ **Internal experts: portfolio managers, strategy or product owners, account managers and channel advisor heads.**

These people can help explain via quotes and video cameos how your firm adds value for investors of all types.

EXAMPLE: The portfolio manager video spotlight that illustrates competence and familiarity with industry environment factors

- ▶ **Niche-adjacent external experts & partners**

How do banks and third-party apps have the capacity to help spread awareness for your brand? Include content they care about, designed to share the spotlight.

EXAMPLE: The partner spotlight that shows end-users of your services how you add value behind the scenes through their participation.

- ▶ **Investment industry & oversight authorities**

Think of all the types of businesses that help you to promote your investment products and services to private investors, such as hedge fund managers, etc.

EXAMPLE: The government agency & NGO approach which highlights the firm's place in the local financial ecosystem

- ▶ **Customer spotlights**

This is a great way to show the customer directly how you help other investors just like them.

EXAMPLE: The investor video spotlight which displays the confidence of the individual investor in the firm

In all of the above cases, we have the potential for sharing the boosting of content on social media with the proper encouragement and awareness put into place. For added distance of your campaign, try to gain momentum in the form of views and encourage meaningful comments that contribute to a discussion. This is the only place for it, where people actually talk “out loud” about the brand.



In conclusion

No one wants “a commercial” when experts and customers can share first-hand insights.

Investment customers can be the best spotlight for your business model. Crowdsourcing the customer base is the most overlooked and yet most effective way to boost a brand in 2021. Give it due attention and give customers and prospects ways to boost your visionary message.

401K and the IRA investors make for great success stories.

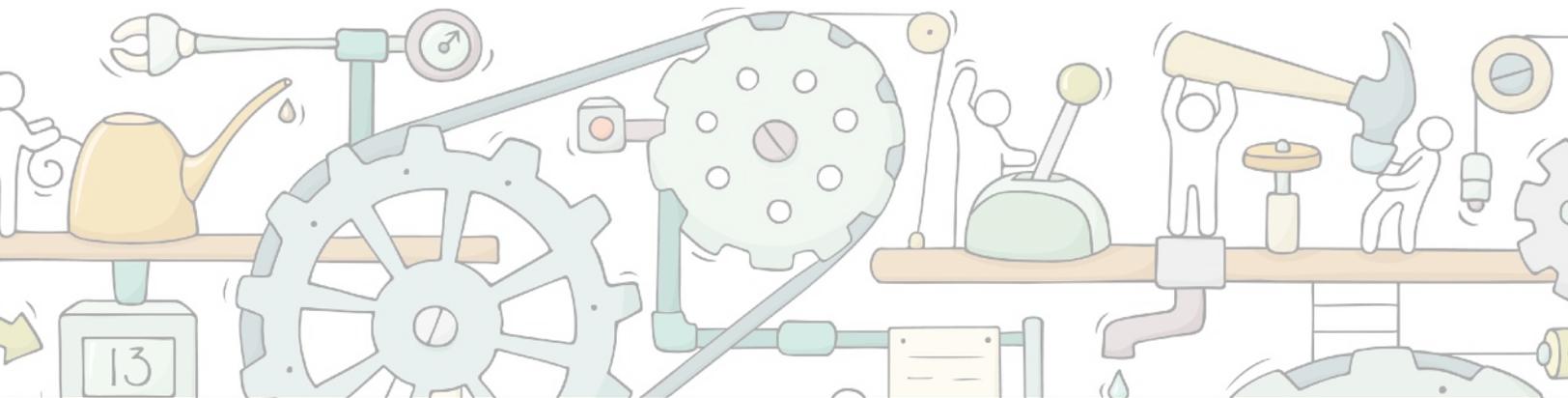
Explore the tragedies and give your investment strategies their due. Think public service announcement when it comes to content tone. Show your topic expert employee advising investment-oriented families with common problems.

Wash, rinse, and repeat.

Throughout all of these methods and platforms, learn from the process. Document the process. Simplify it. Streamline. Make every new successful and brand-specific campaign insight repeatable.

...Use these insights!

Reach out to [Zero Company](#) on how to get started today.



Getting through to your target investment audience is nearly impossible for financial brands using old marketing methodologies. Zero Company develops advanced digital financial marketing campaigns with predictive artificial intelligence and machine learning, putting your message in front of the right people at the right time, allowing you to grow AUM as quickly as possible.

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