



## 6 Ways to Make the Most of your Web Site

By Nancy Opiela  
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Whether your web site is an online brochure to attract prospects or tool to enhance client communication, small changes can generate big returns. Even if your site already has the right look and feel, it can still be improved. When you re-evaluate your site – as you should at least once a year – consider these six goals:

### 1. Make your site a virtual representation of your practice

“Think of your home page as your virtual lobby, a prospect’s first introduction to you, before they ever set foot in your office,” says Marie Swift, president and CEO of [Impact Communications](#). “You want to present your company as it is today, not as it was three years ago.”

Karen Lee, CFP, founder of [Karen Lee and Associates](#) and a client of Impact, decided it was time for a web site makeover when she decided to cultivate a speaking career. “We created more pizzazz by changing the colors, adding new photos, and highlighting my speaking topics and media appearances,” says Lee. “The new focus has already paid off by landing me spot as a financial planning expert for parenting.com.”

Another Impact client, John Barton, CFP, of [Centerpointe Wealth Management](#) in Wichita, Kansas, has always marketed himself as an educational resource as well as a financial advisor. “I wanted to give consumers a good reason to visit my site, but I had posted so much educational information that people looking to hire an advisor were distracted,” he says.

Impact’s solution? A splash page (an introductory page meant to capture the user’s attention) with two entry portals – one for Barton’s wealth management firm and one for his retirement resource center. “I now promote my primary site whether I am marketing my firm or offering free tools for do-it-yourselfers,” says Barton.

William Neubauer, CFP, of Coral Gables, Florida-based [Comprehensive Money Management Services](#), used [Advisor Products](#) to build his web site. Initially, his goal was to build business, but as his practice grew, he retooled his site to diplomatically discourage people who were not ideal clients from calling. “I cover what I do and what it costs, because I’d rather



not have the awkward ‘Can I afford you?’ conversation,” he says. He also gave his site a sleeker feel. “All the bells and whistles weren’t effective,” he says. “Limiting the number of pages and eliminating calculators and my blog has made it easier for qualified prospects to learn about my firm.”

George Guerin, CFP, founder of Denver’s [Guerin Financial Services](#), is redesigning his site with Advisor Products to share more about himself. “I’ve always struggled with the one-sided bearing of the souls that happens in the financial planning process. My clients share their dreams, yet I offer relatively little,” he comments. “I’m hoping that adding my own photography to the site will share my passion for photography and travel and appeal to type of clients I want to work with.”

## **2. Don’t build a shrine to yourself.**

“From the moment a prospect sees your site, they have to know you are all about the client – not yourself,” says Swift. “Your home page should use images and text in a client-centered voice to help prospective clients see that you understand what keeps them up at night.”

Accordingly, your picture does not belong on the home page, Swift says – a secondary page is its proper place. “Invest in a professional head shot,” she advises. “People need to be able to look right into your eyes and get the sense that they could like and trust you. Adding a personality shot here and there is fine. But don’t overdo it.”

Prospects also want to know about your staff, adds Andrew Gluck, president and CEO of [Advisor Products](#). “A team page with photos satisfies our natural curiosity and engages visitors. Moreover, sharing your team’s professional qualifications and talents enhances your credibility,” he explains. “However, don’t expect visitors to be familiar with the alphabet soup of financial services professional designations. If you say you’re a CFP® licensee or have a Series 24, explain in a sentence what you did to earn those credentials.”

## **3. Deliver an immediate message, viewable from seven feet away**

Matt Peterson, founder, [Make It A Great Day, Inc.](#), Washougal, Washington, who specializes in building web 2.0 features into his sites, suggests putting yourself in your prospects’ shoes. “When someone hits your site for the first time, you have three seconds to tell them who you are, what you do, and how you could help,” he says. “Our firm addresses that from both a content and a layout perspective.”



For example, Peterson stresses his seven-foot test. “I get up from computer and move back seven feet to be certain the site pops. I want to see the logo, but lately we’ve been creating boxes for ‘Who we are’ and ‘What we do,’” he says.

Innovative site additions can provide visitors easy access to the information they seek. For example, Thom Hall, CFP and his partners at the Financial Strategies Institute in Midvale, Utah sought to enhance their credibility by providing an engaging [online office tour](#) that both introduces their staff and shows off their facilities.

Rick Epple, CFP, who runs [Epple Financial Advisors](#) in Minnetrista, Minnesota, uses a proprietary method called The Smart Decision Process™ to ensure nothing is overlooked in the planning process. To show prospects what they might expect, he developed a workflow [diagram](#) to illustrate how he works with clients to set goals and develop and implement an investment plan.

#### **4. Get the most out of Google positioning**

“One of the factors Google (and other search engines) use to determine your site’s Search Engine Ranking Position (SERP) is the number of ‘inbound links’ from other popular sites. This tells Google that your site must be important, thus moving your site description up the list,” explains Peterson. In addition to asking other sites to link to yours, Peterson says social networking sites can be a great source of inbound links. “Many of these sites are strategically optimized for search engine marketing,” he notes. “Let’s say a prospect types ‘Wealth Management Chicago’ into Google. Ideally, both your Facebook and Twitter pages show up in the search results. That’s especially effective if these sites have a company overview with a link to your site.”

#### **5. Use technology to lower costs and attract clients**

“Advisors are scrambling these days to keep their income where it was two years ago. They’re using the traditional methods to serve clients and attract prospects, and they don’t take the time to explore the newer, more efficient technology,” says Gluck. “When they do take the time, the returns are excellent.”



For example, Neubauer uses Advisor Products' Client Portal to improve communication with clients and create back-office efficiencies. "Providing performance reports online saves me three days of clerical work each quarter," he notes. "The portal also gives clients access to aggregated data from all their accounts, including 401(k)s and 529s; a vault where I upload tax returns, insurance policies, healthcare directives, and estate planning documents; and access to my blog and to-do lists."

[ByAllAccounts](#), a Massachusetts-based vendor, has become a leader in supporting financial advisors with account aggregation technology.

Neubauer also uses a portal function that allows him to create personalized electronic newsletters for each client according to their characterization as a retiree, pre-retiree, or business owner. Clients have reacted positively.

If you are participating in the social networking craze, use technology to boost your return on investment, says Peterson. "Automatically pull your recent tweets into your site and push blog posts into Facebook and LinkedIn via RSS feed," he advises. "To determine which social networks are most effective in driving traffic to your site, monitor your web site traffic with a program like Google Analytics."

## **6. Sweat the "small stuff"**

"We routinely see changes in fonts, misspelled words, and links that don't work," says Swift. "A prospect's reaction will be, 'If this is what you put forward in your marketing, how can I trust you with my money?'" Swift advises paying particular attention to your firm's name and logo. "Consistency is crucial," she says. "There should be a clean transition between your paper and digital representations."

As the old saying goes, you never get a second chance to make a first impression. When visitors arrive at your site, you want them to feel immediately connected and "at home," says Swift. "The trick is using images and words together in a way that evokes an automatic emotional response," she concludes. "You want visitors to come away feeling a positive connection with your organization and team."

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