



The Building Blocks of Awareness

Sounds metaphysical...doesn't it? In this case, we're not being mystical at all...instead we're being terribly practical. Many of the firms we work with are pretty clear that raising awareness of their capabilities and value proposition within the advisor community is a key organizational goal...yet very few can articulate what successful awareness looks like, or what concrete steps are necessary to form the foundation for awareness.

Other than not knowing what awareness looks like and what steps you should take to impact it, this raising awareness thing seems pretty easy!!!

We'd argue that an advisor is aware of you when they can easily answer the following 4 questions:

1. What does your firm do?
2. Why are you qualified to do it?
3. Who is my best prospect for what you do?
4. How do I successfully present what you do to my clients?

And it's not sufficient that they can answer any one of the questions, they have to be able answer all four of them. Great wholesalers have an instinct when it comes to weaving the answers to these questions into their advisor relationships. But it can be hard to institutionalize instinct. And even harder to articulate the steps it takes to answer the questions and to measure the success of those steps.

Awareness Creation and Measurement

We've taken 35 years of financial services experience and built a platform that uses video to create awareness. Instead of the expense of a field-facing wholesaler, we tell the story using video. But it isn't just a "create the video, send it out and hope awareness happens" strategy. Each video addresses at least one of the 4 building blocks of awareness. The videos are sent to a segmented audience of advisors by leveraging our relationship with Discovery Data. Our videos have a very specific audience and a very specific purpose in the awareness building process.

We measure that awareness by focusing on 4 metrics:

1. Number of video downloads
2. Advisors who download multiple videos
3. Webinar/Event attendance
4. Advisor requested appointments

Clearly the number of videos that advisors download is an indicator of awareness, but we're looking to drive advisors to open more than one of our videos and then to register for a webinar and finally to request appointments with your team. Our platform tracks these metrics and everything we do from advisor segmentation to message creation and delivery cadence is driven by these metrics. There is an order to these 4 metrics and the process pays close attention to that progression. For example, simply sending out webinar invitations doesn't really work if you haven't already established metrics 1 and 2.

To see samples of our work and or to learn more about the ***Building Blocks of Awareness*** and how we can help you to drive them, click [here](#) to view a very short video on our capabilities. Thanks.