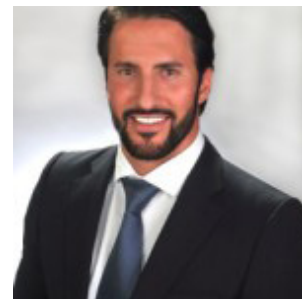




SWAN GLOBAL
INVESTMENTS

STANDING OUT IN A SEA OF SAMENESS

How to refine your unique
value to attract new clients



DAVID LOVELL
Managing Director - Marketing



WHY YOU NEED TO STAND OUT

According to Cerulli Associates, there are over 311,000 financial advisors in the United States as of June 2019. That's a large sea of options for investors.

For advisors looking to grow their practice, it is becoming increasingly difficult to stand out and even more important to do so. When viewing the brand messages, websites, and advertisements across the marketplace of advisors, the claims and service offerings are dizzyingly similar:

- “offering comprehensive financial planning services”
- “utilize the leading financial planning software in the industry”
- “provide objective guidance and recommendations”
- “a partner in your journey”

Sound familiar?

It's not surprising that investors can easily get lost in this sea of sameness. So, how is your messaging helping you stand out?

Here are some helpful insights and suggestions you can begin utilizing now that will help improve the appeal and differentiation of your firm.



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CLARIFY YOUR BRAND & MESSAGE

Establishing your brand doesn't have to cost you a lot of money. It begins simply with identifying who you are, what you offer, to whom, and, most importantly, why. The problem most advisors run into here is not also identifying what makes them unique in comparison to the rest of advisors.

Identify your target audience.

Are there clear segments within your audience(s)? If so, consider the defining characteristics, needs, and ways you can help each one. Whether you have one target audience or four, it's best practice to create a persona to easily identify and remember each segment when presenting your firm, message, content, and building portfolios and communication plans.

Create a unique & bold message.

Your value proposition needs to state who you serve and why you serve them. It should center on the benefits you provide your audience. You need to show you are more than just access to investments and advice. Investors can access investments and advice on their own (RobinHood, Betterment, Stockpile, eTrade, Yahoo! Finance, CNBC, etc.).

One way to do this is to focus on how you address the emotional side of investing. What service or benefit do you provide that they can't get anywhere else? How are you helping them with their needs, wants, and concerns?

Know your competition.

The best way to differentiate yourself is to first look at what your competition is saying and doing. Analyze their messaging. Are they focusing on themselves? Are they highlighting technology or credentials that investors may not understand? Are they using jargon?

Over 60% of investors think all advisors make the same promises (Advisor Value Proposition- BNYMellon/Pershing, 2018). So while you're looking at competition, keep an eye on similar messaging, vague promises, and generic statements.



IMPROVE THE FRAMING OF YOUR VALUE PROPOSITION

Focus on what makes you stand out and what matters to investors. If you're offering the same products, fees, and years of experience as your competition, why should an investor choose you? Focus on what makes you different and build that into an understandable, repeatable, and referable story that conveys your unique value.

Understandable

Use straight forward language that investors can make sense of and focus the story on how you can help them. When the value at the center of the story is about them and not you, it's easier for them to understand what value you bring them that other advisors don't.

Repeatable

Repeatable stories are necessary for referrals. Here are some tips to making stories easy to remember and repeat for when your clients want to refer you to friends and family:

- Tell simple stories about real people (with names changed).
- Use acronyms or mnemonic devices.
- The rule of 3's: no more than three benefits or points per story.

Referable

You might be receiving more referrals than you know — it's just your clients may be really awful salespeople for your firm. They might be telling others you're nice, better, or have a 'smart team.' While these are all great compliments, let's be honest: Isn't that what others are saying about their advisors?

Giving your clients an understandable and repeatable story about how you helped them address their needs will give them something different and intriguing to say about you and your valuable service. For example, take this hook:

Client: "I've been a little nervous about all this recession talk and what it could mean for my investments, but my advisor eased my concerns by giving me this "portfolio airbag."

Friend: "What's that?"

Client: "My advisor says that markets can be hard to read, and outcomes hard to see, therefore timing it right can be nearly impossible. But just like I wouldn't drive a car without an airbag, we shouldn't invest for something as valuable as my future without an airbag in my portfolio."

The client conveyed the unique value proposition in a personal, relatable way. If their friend has a similar concern, the potential referral is now wondering what that "airbag" thing is. It is now more probable that they will want to take some action: to learn more, request the advisor's name/number to call, request an introduction, or at least check out the advisor website.



BE BOLD TO STAND OUT

Creating awareness and interest starts with being noticed. If you want to attract new prospects and generate more referrals, you'll need to stand out and be memorable. Once you've clarified your message and found your repeatable, referable story, you now need to use bold, powerful language that breaks through the noise and sameness investors perceive everywhere.

- Be concise. The fewer words the better.
- Directly address audience emotions, objectives, and needs.
- Use specific language that describes your benefits and value.

Knowing your segment(s) allows you to be more precise with your website language, your emails, and your marketing pieces. When you use the right language that resonates with prospects, you increase the likelihood that they will notice you, feel heard, and consider you more trustworthy to be their advisor.

One way to test the relevance of your messaging with your segment(s) is to test it with people you know outside of the industry who resemble your client segments. Invite them to review your website or newsletters periodically and provide honest feedback. Are your content, images, and even word choice confusing, bland, or interesting? You may just get a client out of it.

DO YOU HAVE TIME TO STAND OUT?

Sir John Templeton states, "It is impossible to produce superior performance unless you do something different from the majority. If you buy the same securities everyone else is buying, you will have the same results as everyone else."

Refining your brand messaging doesn't need to cost a lot of money, but it does take time and effort.

You need to take the time to honestly analyze your business, your website, your messaging, and more. Do you have clearly defined audiences? Are you trying to relate to their needs and affinities? Are you simply and clearly stating your unique value in terms they can understand? Is it truly unique? Is there something or combination of things you provide that no one else can? This might take some time to identify and polish, but once you do, overcoming the challenge of standing out in the sea of sameness becomes easier.



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ABOUT SWAN GLOBAL INVESTMENTS

Investing Redefined

Our mission is to support independent, growth-oriented advisors to be more successful in serving their clients and growing their businesses.

Since 1997, our hedging and options strategies have been redefining investing to directly address the biggest threat long-term investors face: market risk.

Market risk is too big a threat to investors to be dealt with passively. So we hedge it.

Our simple, yet innovative investment philosophy is the foundation of our Defined Risk Strategy, a rules-based, multi-asset hedged equity strategy, with a track record of seeking to generate consistent returns while defining, or limiting, downside risk to improve investment outcomes and managing risk for irreplaceable capital through full market cycles (bull and bear).

Swan Global Investments is an asset manager headquartered in Durango, Colorado, with offices in Puerto Rico and Tampa, Florida.



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1099 Main Ave., Suite 206
Durango, CO 81301