



WALK THE TALK

WORKBOOK

ENGAGE IN THE SOCIAL DIALOGUE

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INTRODUCTION P3

Meeting of minds

KEY POINTS FROM THE VIDEO P4-5

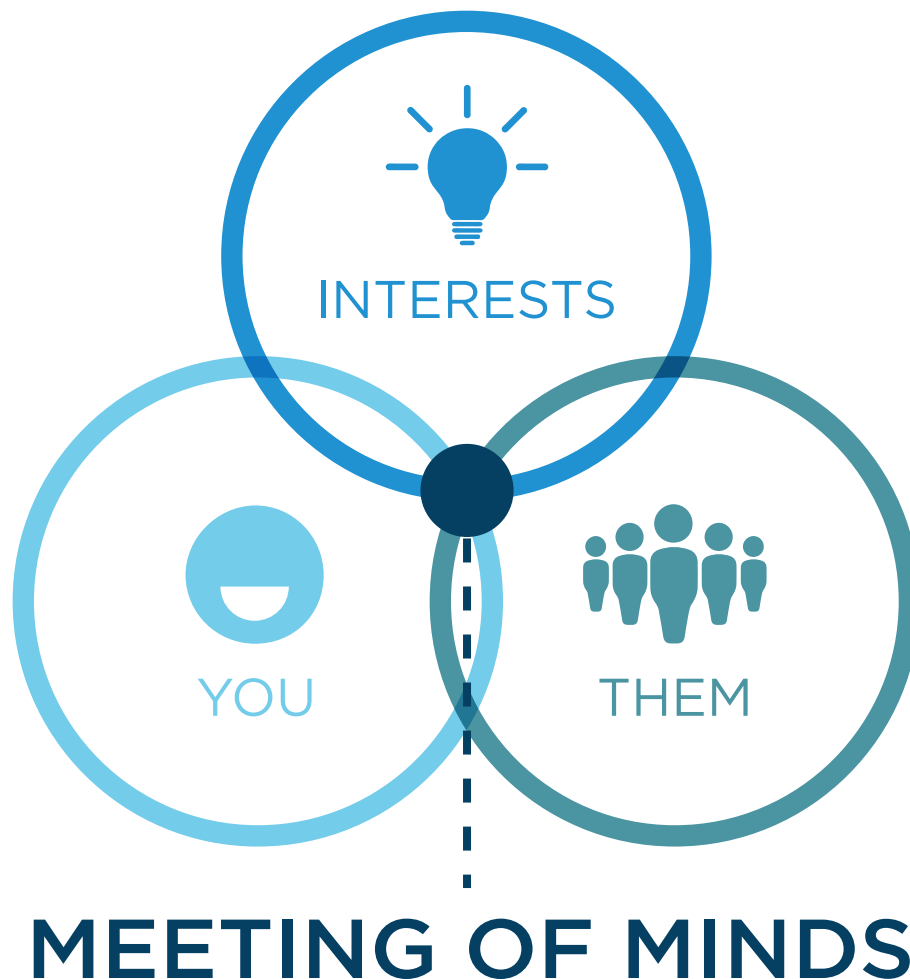
The client journey and seamless content

Useful tools



APPLY THE LESSON P6-7

- Write down 5 pieces of content you can leverage / create for the first two stages of the client journey
- Set up Hootsuite to manage your social media dialogue and use it to co-ordinate your social publishing



- Where do your interests and the interests of your clients intersect?
- Where is the meeting of minds?
- What questions can you answer?
- Which problems do you know how to solve?
- Which are their woes?
- How do you help?
- What unspoken need do they have?
- What educational tools do you have to build trust?

The social dialogue happens in the intersection between your client's interests and your expertise.

THE CLIENT JOURNEY AND SEAMLESS CONTENT

1. AWARENESS

- How to get out of credit card debt
- Educational Blog on issues relevant to clients
- Visual Diagnostics
- eBooks on financial literacy basics
- ANZ content relevant to Australians
- Research from your client base
- Infographics

3. EVALUATION

- Video - 5 questions to ask a potential financial coach / adviser
- Video - How to tap the secret of compounding
- Case study of happy clients
- Whitepapers - "How to evaluate financial advisors?"
- eBook - "Telling the cowboys from the trusted advisors"

5. USAGE

- Onboarding
- Scenario plan
- Pre-scheduled follow ups
- Administrative support
- Sign up for regular educational podcasts
- Tips on best financial apps
- Social media updates

2. ENGAGEMENT






- Video - Unique Selling Proposition
- LinkedIn
- eBook on value of financial advice
- Quick draw video explaining financial advice
- Graphic illustrations of what financial advice is
- Video testimonials
- Newsletter sign up
- 5 Signs You Need TPD Insurance

4. DECISION

- Buying guide
- Comparisons
- Reviews
- ROI
- Webinar
- Webmeeting
- Checklist of considerations
- Your Vouched For profile
- Connect with your LinkedIn - profile to show credibility

USEFUL TOOLS

MY THOUGHTS

- MailChimp
-  Hootsuite™
-  LinkedIn®
-  slideshare
- Quora
- facebook®
-  buffer
-  twitter

5 PIECES OF EXISTING CONTENT YOU CAN LEVERAGE / REPACKAGE / OR RETARGET FOR A NEW AUDIENCE?

(Write down)

AWARENESS STAGE

CONTENT:

1.
2.
3.
4.
5.

ENGAGEMENT STAGE

CONTENT:

1.
2.
3.
4.
5.

GO ONLINE AND **SET UP** HOOTSUITE

Utilise it to **prepare content** once, and **leverage** the content often.
Connect **LinkedIn, Twitter, Facebook** via hootsuite's central dashboard.



