Ensure Your Web Marketing Brands, Builds, and Boosts Your Practice
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Financial professionals have a web presence: Some use email and some may be on the social web. However, tools like websites and social media don’t make marketing magic to build practices—it’s how the tools are used strategically that will elevate a business. To ensure your web marketing brands, builds, and boosts your practice, this session will cover the five factors for web and social marketing success and explore a strategic framework model to help you develop a powerful web marketing strategy as well as address ways to critically evaluate what to manage in-house versus outsource.

Marketing and Web Marketing

Successful advisors don’t just work in their businesses; they work on their business. That means addressing all aspects of the business: operations, administrative, and marketing/sales. One of the biggest misconceptions about marketing is that marketing and advertising are one in the same. Marketing does not mean advertising. Marketing is an umbrella term that encompasses everything that is used for marketing, including branding, websites, social media, advertising, public relations, email, mobile, and branding. The true meaning of marketing is “maximizing relationships.” Marketing is the critical piece of your business puzzle that helps support relationship development—new business as well as existing business. Marketing (maximizing relationships) addresses five main objectives:

1. Awareness
2. Communication
3. Connection
4. Service
5. Sales

One of the most obvious purposes marketing serves is to build awareness. A financial professional can be the best at what she or he does, but if nobody knows, what’s the point, right? Awareness comes from more than advertising. As you know, word-of-mouth marketing is one of the best (and lowest cost) ways to build a business. In today’s social web world, “word of mouse” (getting the word out online and on mobile devices) is
also critical to weave into your awareness campaign. Seventy-four percent of people search for products, services, and information starting with a search engine. On the web, I encourage professionals to aspire to achieve TWD—total web domination. The more diverse your web marketing portfolio is, the better. When you invest in a diverse web marketing portfolio, you gain more visibility and you also get multitasking results by securing credibility and scalability. Financial professionals can build awareness (or, as I like to say, TWD) by investing in a number of awareness opportunities, including advertising, search engine optimization, referrals, online marketing, traditional marketing, social media, and PR. There is a concept I developed to help passionate professionals approach marketing in a way that lasts the test of time. It’s a concept called MarkEDing. MarkEDing is a misspelling of the word *marketing* but highlights the educational twist your marketing needs to have in today’s peer-powered web. Marketing isn’t about pushing your products and services; it is about helping your customers. You help them in your practice, but you also need to help prospective customers understand that they need your firm. That happens through education.

You are all familiar with the acronyms B2B (business-to-business) and B2C (business-to-consumer). Well, today’s marketing world is all about P2P marketing—peer-to-peer or people-to-people marketing. Thanks to the power of the web, consumers are empowered. They look to their peers for advice and they also trust peers (who may not even be personal contacts but are “people like them” online). Professionals are becoming more human to tap today’s peer-to-peer marketplace through their websites, content, thought leadership, and more. One of the easiest and most effective ways to embrace the new rules of marketing is by not thinking of marketing as advertising (or the used-car salesman approach) but as a form of education. Educating your market with helpful content, sharing testimonials, and offering great service online makes you approachable. The more approachable we are online, the more likely we are to develop a peer relationship. I will talk more about markEDing in our session. I wanted to plant the seed now so that the concept starts to take root. We don’t sell as well using the tactics of Don Draper of *Mad Men*; we are more likely to be service-oriented like Dale Carnegie. Marketing by being educational is one of the most ethical, scalable ways to build awareness. It takes an average of seven touch points to make a sale. The more markEDing we have working for us awareness-wise to maximize touch points, the better.

Next, marketing is a way for professionals and organizations to communicate as a form of maximizing relationships. As I shared with the *Mad Men* TV show analogy, we no longer have to stand at the top of a mountain and scream our message to be heard (which is great, since most of us don’t have that kind of
marketing budget!). Marketing also serves the purpose of communicating. Think of communication as information distribution . . . that boils down to education. Marketing, especially web marketing, is a very cost-effective way to communicate, educate, and inform. Critical communication points to address with web marketing include your value, distinction, and philosophy as well as basic product/service information.

Communication isn’t just via text content. We can communicate through our photos, with video, or having our clients communicate on our behalf with testimonials. If you are involved with charity work, don’t keep that to yourself; communicate that information as well through online press releases and blog posts or under a news section of your website! Sometimes communication can be on all three areas I mentioned to increase the likelihood of being read. Communication can also serve as a way to help educate a current or prospective customer understand the full value your practice provides. There is a saying: “We cannot not communicate.” This saying originated in the world of nonverbal communication and became popular with communication experts in academia. I like to use it as a great marketing mantra to remind us all that, as professionals, we cannot not communicate our value and values. The best way to do this is to put our message in a place where the message will be seen again and again—voice it on the web. Web communication works again and again on multiple customers.

Taking the time to compose compelling content is a communication investment that can last the life of your organization. Keeping valuable information to yourself won’t help the people who need your services. That isn’t just what you do or how you do it but why you do it. Speaking of why you do what you do, there was a great TED talk by Simon Sinek that I encourage you all to watch for marketing inspiration. He talked about some of the most successful companies and their leaders and how they inspire that greatness. His success formula is so simple. It’s not the what or the how, it’s the why. Most companies talk about what they do or how they do it (better, faster, cheaper).

What Sinek points out is that the real movers are the ones who lead because of why they do what they do. Look at Apple. It makes computers and MP3 players (so do other companies). But its why—the dedication to design, a passion for lifestyle, great user experience—is what drives the passion for the brand and attracts the customers and builds loyalty. Why do you do what you do? What is the heart of what got you into your business? I want you to really think hard about this, not just now but for the rest of the trip and as you travel home. It’s not the science of the web or the art of design that will brand, build, or boost your practice. It is the heart of your passion and purpose that will drive the art and science of the web and be what you launch your strategy from.
Speaking of heart, the next piece of the marketing purpose puzzle is connection. We make financial professional decisions on much more than need—we make purchase decisions off of want. On the web we connect with content. We connect with stories—think storytelling as story selling. Meaningful marketing makes, builds, and sustains relationships. Successful marketing execution helps build the “know, like, and trust” factors (so that people know you and trust you). We connect through our stories (like how/why you started the company, and your philosophy, history, expertise, and hobbies). Our passion can come through on the web through content, graphics, video, articles, and much more.

Fun fact: One of the most frequently visited pages on a website is the “About” page. I find when I advise clients that this is one of the biggest and lowest cost opportunities to optimize web marketing. Messaging is so important online. Most companies have sterile pages that talk about the services a firm provides, the what is there but the why is void. Leverage pages like your “About” page to connect. Talk about your credentials, things like why you got into your profession, your credentials, and your years of service. And if it works for you, highlight your team. This boosts company morale when staff members feel like you value them enough to make them a part of your public presence. If you are comfortable getting a little more personal, share your passions and your charitable work.

*Inc.* magazine did a feature on the importance of “About” pages. The primary purpose of a website’s page is to provide information about your business and what it can deliver. Start with the basics: who you are, what you do, whom your company serves. Include your years of business and mission. Little inclusions like your address and how to contact you can also be on this page even though they are also on the “About” page. But don’t stop there or you will have a downright boring “About” page. By incorporating a few strategic components, you can go beyond blah and add some marketing ahh to your web marketing. Simple tactics can make your “About Us” page a more exciting read and your company seem more accessible, which may ultimately drive business and increase sales. Avoid writing a soliloquy (too much text is a turnoff) and focus on connecting with your site visitors. I had my employees write their own bios for my company’s “About Us” page. My only mandate was that in addition to providing a snapshot of their professional history, they include personal information such as hobbies or their favorite activities. It wasn’t overly personal but enough to give a flavor of the personality of the team. This might also be a good place to include email addresses for your staff. Readily available contact information shows customers that you want to hear from them and that you have nothing to hide. The “About
Us” page needs to reflect the organization. It’s not just storytelling; it’s story selling! It’s like the story of how a company started, but it should also be the story of who’s behind it. Are you an avid skier, a golfer? Or a yoga guru? When I developed the brand for my company, Web Marketing Therapy, we used an icon called the phrenology head. The phrenology head is a defunct psychological myth that proposed that areas of the brain impact personality. While this theory did not prove true, I found as a “marketing therapist” that the personality of a business is one of the most valuable connection pieces of the marketing puzzle. This design is a reminder to organizations to tap their authentic personalities online. It is the marketing success steps that we will cover that come together through sharing passionate content that makes marketing click. We use this icon not only as a way to address the puzzle pieces of marketing but also as a reminder that, on the social web, being authentic to our passion and purpose is one of the most powerful ways to create connections and close business. Remember, we are no longer in the world of B-to-B, or business-to-business; we’re in a world of what I call P-to-P, people-to-people. Relationships are the name of the game. Your clients want to know you, like you, and trust you.

Service. Ahh, customer service. The most overlooked piece of the marketing puzzle. Why do we get word-of-mouth referrals? Because of great service. How can we build our practice? By leveraging the web to be not just an awareness tool but also a hub for service. Now some of you may be thinking that you can’t provide the same level of service online as you can via phone or in a meeting. That is correct. What I am referring to is web service: simple things like making sure you are serving someone when she or he searches your name or your company name to call you—is your site coming up? When people go to your website, is your phone number easily found? Can people scan your site and find the contact tab and your address and directions? Are you serving current and potential clients by educating them on all the services you provide so that they don’t go somewhere else for a service you can provide under your organization’s umbrella? In marketing, we serve and support to sell. I love this quote by Robert Greenleaf: “Good leaders must first become good servants.”

Awareness campaigns can drive all the customers in the world to a website, but if the online presence neglects to build trust, establish credibility, and serve them well (and repeatedly serve them well when visiting your site), then there is a serious flaw in the marketing puzzle. Marketing needs to be a branding, visibility, and customer service tool. It can and the web can work service wonders in your sleep!

One last note on customer service. How many times do you find yourself repeating the same things to customers or in the sales process such as directions to your office? Simple things. These are the types of things you can have on your site not only to serve your customer but to serve yourself—time is money! It’s all
markEDing. Service isn’t just transactional. You are doing your clients and prospective clients a great service by helping them understand all that they can do with you and through your practice. Nothing will take the place of live interaction, but if your web marketing can be a backup to help serve and support current and potential clients, then that is marketing magic. Great case in point—I am a small business that grows my practice every year. I didn’t have employees when I started. Now I have employees and health care through my advisor. When I was educated that I could also run my workers’ compensation through a firm I love and trust and not a rep who has never made a meaningful connection with me, I was thrilled. That is service. Had I been able to go online and understand that all of these services were part of what I could do, that could have expedited my shift . . . and dollars in my advisor’s pocket (good thing my firm is going to help redo the website! Ha!).

Last but not least, marketing has the purpose of making sales. Smart marketing sells. We are in business to make money, right? Web marketing is a broad and deep arena to build relationships, close sales, and convince people to hire our firm and rehire our firm for additional services. To achieve more sales, all the points above (awareness, communication, connection, service, sales support) must be part of the marketing puzzle. Now that we have a strong platform to move forward on, let’s dive deeper and look at success factors for web marketing and social media marketing.

Five Factors for Web and Social Media Success

Word of mouth marketing will always be a critical piece of your marketing puzzle, but are you leveraging today’s “word of mouse” marketing? As you know in your industry, relationships are everything. Marketing works to attract new clients but also to grow existing client relationships. In today’s day and age, we don’t need websites; we need web marketing solutions (that include the website but have evolved to be so much more) that adhere to business compliance use.

There are five factors to web and social media marketing success. You want all areas optimized to brand, build, and boost business.

1. Credibility
2. Usability
3. Visibility
4. Sellability

5. Scalability

To secure new and additional business, we have to be known, liked, and trusted. Credibility is our first marketing success puzzle piece. Stanford University did a Web Credibility Guidelines research project to identify the top ten areas that make a company evoke credibility to users. Their findings include this: Make it easy to verify the accuracy of the information on your site. Next, show that there’s a real organization behind your site. The more you can show the legitimacy of your organization, the more you will boost credibility. Easy credibility boosters are making your physical address visible on every page of your site in the footer. A prominent contact page and very visible phone number also help. Stanford’s study also suggested posting a photo of your offices or listing a membership with the chamber of commerce. Some organizations share their BBB logo online if they are affiliated. Keep educating—share the expertise in your organization and in the content and services you provide. Share all the experts on your team, credentials, awards, and certifications. If you are affiliated with a respected organization, make that clear. Be mindful of the links you share on your site. Don’t link to outside sites that are not credible. Your site becomes less credible by association. Don’t just tell, but show that honest and trustworthy people stand behind your site. The first part of this guideline is to show there are real people behind the site and in the organization. Next, find a way to convey their trustworthiness through images. Images of smiling, professional people evoke trust. As I shared earlier, the idea of posting employee bios that tell about family or hobbies can create connections; this tactic also boosts credibility. Credibility also includes design. You’d have a different impression of me if I stood up here looking unprofessional or unpolished. The same goes with your online presence. Make sure your site looks professional. Don’t think of online design as something you just spend money on—it’s an investment. Credibility pays back again and again. Stanford’s credibility study found that people quickly evaluate a site by visual design alone. When designing your site, pay attention to layout, typography, images, consistency issues, and more. The visual design should match your organization. Design needs to be on brand and on purpose. We’ll talk more about this under the usability section, but Stanford does say that credibility is also tied to user experience—making your site easy to use . . . and useful. Their research showed that sites win credibility points by being both easy to use and useful. Credibility also comes from updating your site’s content often. People assign more credibility to sites that show they have been recently updated or reviewed. This can come from compliance approved blog posts, online press releases, and testimonials, and promotional content like ads and offers. Sites need to serve and support, not overtly sell, to be credible and approachable. As for writing style, be social-centric—be clear,
direct, and sincere. Last but not least, avoid errors of all types, no matter how small they seem. It’s always worth having a second set of eyes review content to make sure there are no goofs in your content.

The next social web marketing success step is usability. There is a law of usability: If people cannot use your website, they won’t. Just like you wouldn’t build a house without a blueprint, you don’t approach web work without a map and directions. Fun fact: The top right corner of your web page is often the most valuable piece of real estate on your website. Navigation needs to include obvious tabs such as “About” and “Contact.” I find adding tabs such as “News” or “Press” adds credibility and shows a company’s news. It’s great to get people to a site; usability gets people through a site. Web users need to be guided to take action with “Call to Action” visual and textual guides that help lead a user into various pages. The most valuable real estate you have as marketers is that square space of real estate on your screen. Some of you may want to extend this into thinking about mobile design. Smart user experience immediately tells a web user who you are, what you do, and whom you serve. This can be geographically by bulleted out your services so that they are quickly scannable and having dedicated sections to help users navigate to where they need to go. Contact information and simple guides such as “Learn More” next to the text can prompt action. Think of usability as an invitation. People need to be invited to take action. Invite them to contact you. Just as you would architect a house, you need to think about the number of rooms in the house and the features and the layout of each room. In the web world, planning starts with the critical pages of the website. Next, web optimizations often start with something called a wireframe that helps show where information will go. Most wireframes just address layout; there are no photos or colors or even text. It is essentially a blueprint to help use web real estate in a mindful way. Usability applies to websites, mobile sites, email newsletters, and blogs. Make sure that you are using web tools in a way that is on brand and on “purpose,” meaning that the layout is focused on getting people to see and go where you want and need them to go.

Web visibility is the success puzzle piece that really distinguishes web marketing from other marketing channels. The visibility that comes from web marketing can be low cost or no cost. Just as a diverse financial portfolio is secure, so is a diverse web visibility portfolio. The way people will find you will vary, but search engines will likely be a big driver for years to come. According to search marketing firm iProspect, 90 percent of people searching for products, services, and information use search engines. Once a search engine visitor types a query into the search box and receives results, studies show that:
• A natural search receives 250 percent more traffic than the paid search.
• A natural search converts 30 percent higher than paid search.
• The first page on a search engine results page gets at least 80 percent of the clicks.
• The second page on a search engine results page gets much less, at about 10 percent of the clicks.

With web and mobile use growing and the use of search engines dominating the way consumers find organizations, it’s more important for financial professionals to have their businesses searchable than ever before. Search visibility can be paid with advertisements or can come naturally from organic search. Organic search comes from optimizing code on a website, using specific key phrases in content, and improving linking. Organizations with businesses in certain geographic locations can list their businesses for free visibility on Google+ places, Yahoo Local, and Bing. This can be done manually by the business owner. Paying a third party such as Yellow Pages is not necessary. Visibility can come not just from a website or from search listings. Visibility can also come from LinkedIn profiles, blog posts, online press releases, and ads. There are ways to optimize search engine visibility, such as optimizing meta tags, urls, and other geeky stuff that I teach at UC Berkeley Extension and manage for clients. But geek speak aside, the things that you need to know as a business owner are simple. Just remember these three points: architecture, content, and linking. The great news is that visibility is no longer granted to the web geeks of the world. It is granted to organizations that are great at content. Content is in code, website text, blog posts, video uploads, online press releases, and social media reviews and articles. Just being social on the social web creates content. What phrases do you want to be searched and found on? Make a list of desired visibility phrases. Then look critically and see if you are using those phrases. Let’s do some sample searches, such as business health insurance San Jose. You will see websites and even social media blog posts. You can see businesses on LinkedIn’s company profiles. [visuals]

Next in the web marketing success puzzle is sellability. This is the area of the social web success puzzle that is often the most challenging for professionals. I hear a lot of “I don’t want people to think that I am bragging” or “I’m not good at selling myself.” Tooting your own horn may not be easy, so stop thinking of sellability as being boastful. If I were to ask you why I should hire you versus the competition, I bet you’d give a mouthful, right? This is sellability. What is your organization’s unique value? Sales don’t just come from need; they come from want. Make your web marketing work to help people want to choose you. How can you educate clients and potential clients on why you are the practice worth working with? Testimonials? Case studies? Messaging is a sellability factor, and it’s not just website copy. Thought leadership is a powerful selling piece. Thought
leadership is all about education. When professionals are educated, they feel empowered. When we are empowered, we feel powerful, and feeling powerful helps shape decisions. We boost sellability by authoring content that educates and empowers our target market. We sell not by being experts in our field, but by being an authority. Note that in the word authority is the word author. What content can you share that empowers your current and prospective customers? The content doesn’t all have to come from you. If your clients are business owners and there is a great article in Forbes about business, you can be a “web gemologist” and share links like this on a blog, on LinkedIn.

The last puzzle piece for web marketing success is scalability. I’ve talked before about how marketing isn’t something you spend on but rather something you invest in. Web marketing is scalable. Just as a good stock compounds and grows over time, the same can happen with your marketing positioning thanks to the power of the web. Websites can have pages added that pick up in search engines, and blog posts grow and compound, equaling thousands of posts and web pages. Your clientele grows, and they refer you. Your best customers are your current customers. Scalability defines how all the small steps of the web marketing puzzle compound into becoming total web domination (TWD), but it also applies to the compounding list of clients you develop. The best thing you can do for your business is to grow your existing business. Find ways to leverage what you scale. Love your customers. Share valuable information with them. Make your marketing about them and not about your company and network. This is the World Wide Web, not the world wide pole. Everything is interrelated. Store contacts in your email database. Create connections though your website, search engines, blog, and educational content, and through professional social networking vehicles like LinkedIn. Here you are and here are your contacts. [visual] Scalability is how our web presence works to reach more people, have other people be our brand ambassadors, and grow our businesses.

When your company has all the success pieces of credibility, usability, visibility, sellability, and scalability working in unison, you have a powerful unified marketing puzzle that yields multitasking results. I love web marketing for its low cost and sometimes no cost value. What I also love about web marketing is that it multitasks. For example, let’s say that someone reads an online press release about your new office location. That is visibility. But if the release is well written, educates the reader about the services you provide, and has your contact information, it can boost your sellability as well. An organization’s press release is a positioning tool, and just seeing it makes the public think, “Oh wow, they have press releases written about their company; they must be successful.” This boosts credibility. One effort of multitasking yields results again and again.
Strategic Framework to Manage Web Marketing

We’ve looked at the five marketing success steps as well as explored examples to give you ideas to take back to your organization. Many of you may be thinking, I don’t have time for this, or, There is so much to do, what do I prioritize? There is no need to feel overwhelmed. Web and social media marketing success does not come from execution; it comes from strategic execution, so taking time to think before you act is a healthy, compliant approach. I advise professionals to remember this mantra: strategy first, execution second. The good news is that small steps make a big difference. Don’t think that you have to do things all at once.

To develop a strategy for your business, here is a strategic framework I developed to help you start your strategic development. [visual] First things first. Start with your why. Why are you in business? Why should someone hire your practice? Get to the heart of what you are all about, and don’t hesitate to share this information with your staff. Publish your why. Approach marketing from the inside out. Your why is your compass, your north start to guide all the work you do. Marketing is all about relationships. Folks who are good at relationships are good at communication. Get to the heart of your business, document it internally, and then let it be your guide as you do outreach. Don’t be afraid to be passionate. This doesn’t mean being sappy or emotional; it means being authentic and real. Passion is contagious. The next step is to look at policies. In your industry there are going to be compliance issues that must be addressed. Do you have a policy on how you will use the web personally and professionally? Will you allow staff to manage web work, or will you want to review everything before it goes to a webmaster? What compliance rules are important to document and share with staff? Think about what rules and policies you want implemented, and document them. My firm has been hired by corporations to clean up web marketing messes (which is not my favorite work to do, but that’s part of marketing therapy!) and the number one reason any mishaps occur is because there is a lack of policy. Like any new game, the rules must be established before you play. Who are the responsible parties? Who will own what? Who is accountable for content? Moderating? Managing? Get roles and responsibilities and guidelines defined.

Next, define success. What metrics will you be monitoring to quantify what is working? When it comes to metrics, remember that if you can measure it, you can manage it. Success metrics are quantitative and qualitative. Are you asking and documenting how people heard about you? This is the simplest question and often the most overlooked. Asking this question on your contact form on your website and having your staff ask it on a phone call can be so powerful. And track it. Use a shared document like Google Drive to track leads and
where they came from. Tracking leads in Excel will allow you to sort the data and identify patterns. Success can be leads, referrals, website visits, even completed contact page forms. Thanks to free tools like Google Analytics, we can track our web visitor’s behavior: pages visited, most read blog posts, geographic location of users, and referring sources of traffic—even what words they typed into search engines to come to the site.

Have a measurement plan in place. My firm creates benchmark reports for our clients to have a monthly ritual of looking at data to help keep comprehension and optimizations moving. It’s a great exercise I encourage you to do to stay on top of your marketing. Understanding drivers helps spark creative ideas and ignite next steps.

Marketing is something that you don’t turn on and off. It is part of your everyday practice. Your blueprint is for optimizations and ongoing work. Next in the planning process is to look at your people. People can include you, internal resources, and external resources. Employees, vendors. Do you need to do what you do best and have others do the rest? We’ll cover this topic more later, but part of your strategic planning is to look at who will be doing the work. Great ideas are only great if they are executed brilliantly. Get a clear management plan in place. Next, document your strategy. What do you want to do? When do you want it done? This step is about formalizing a game plan—your marketing blueprint. Document your “need to haves” and your “nice to haves.” Having wants and needs documented puts your plan in action and gives you a place to check off work. A strategy is defined as “a plan of action or policy designed to achieve a major or overall aim.” Here is an example of a web marketing checklist specific to public relations. Here is one for website optimizations. Here is one for social media. [visuals] Get that plan in action. What bridges the framework is having a clear focus on your brand. Your brand is more than a logo. It’s a promise, a message you consistently communicate through graphics, service, and overall experience. Do you have a style guide to protect your brand assets? Here is a sample style guide. [visual] A style guide is your brand’s usage documented in a way that helps any professional using your marketing assets in a consistent way. Last, on the social web our marketing plans come together through the use of content. There is a saying on the social web: “Content is king.” This applies to all aspects of web marketing. Content is our web text, blog posts, social media posts, and online press releases and articles. The whole social web marketing puzzle comes together from publishing content. How do we get good at marketing? We get good at communications. We communicate on the web with content.

Manage Marketing In-House or Outsource It?

One of the biggest marketing management questions is, Should I manage marketing in-house or should I outsource it? Well, I am not one to “should” on people, but my consultant answer is “it depends.” When in
doubt, remember to do what you do best and hire others to do the rest. I happen to enjoy writing, so when it comes to writing, I do that myself. But I can’t design to save my life. My unique ability is creative direction and ideas, so I do that and hire help to execute my vision. I know how to manage social media, but I have my staff help with that because the reality is, my time needs to be spent on bigger areas of the business. Our team has clarity on policies and procedures and our company voice. Having rules gives me the confidence that work is done in a way that I am comfortable with. We have clients who hire us to train their staff, some hire us to help develop strategy, and some clients even hire us to represent them on blogs . . . as if we were them. Look at what your unique abilities are and decide accordingly. Your decision will look at all aspects of your marketing:

- Branding
- Web work
- Search optimization
- Online PR
- Blogging
- Social media
- Analytics
- Email marketing
- Strategy

Of course, budget will be a deciding factor as well. Some of you may be familiar with Maslow’s hierarchy of needs. Basic needs need to be met first, such as food and shelter, then love, and eventually we step up to self-actualization. Not all people reach self-actualization, but I have confidence that the successful people in this room will get there in life and in marketing. Just as you wouldn’t build a house on an unstable foundation, you need to think about baking your marketing cake in order, foundation first. Here is your marketing hierarchy of needs. [visual] Invest in quality “ingredients” and think about working in a systematic order. You start by assessing your situation; optimizing things that need to be fixed, and then moving on to new channels: “need to haves” first, and then “nice to haves.” It can be more cost-efficient to invest in professional support to get things done efficiently and professionally. Sometimes doing a bunch of low-cost so-so work can negate a brand and cost more in having to redo things.

Conclusion
In your practice, you are responsible for a lot. Marketing is what builds and grows our business. Health is wealth for our bodies; it is also the same for our marketing. Healthy marketing = wealthy organizations. Take care of your practice by taking care of your marketing. You cannot afford to not have a powerful voice in today’s influence economy.

Endnotes
5 Data from 1,000 sites using URCHIN software and presented at convertlinks.com.