

Transforming Your Financial Advisory Guide & Case Study

from Onimod Global



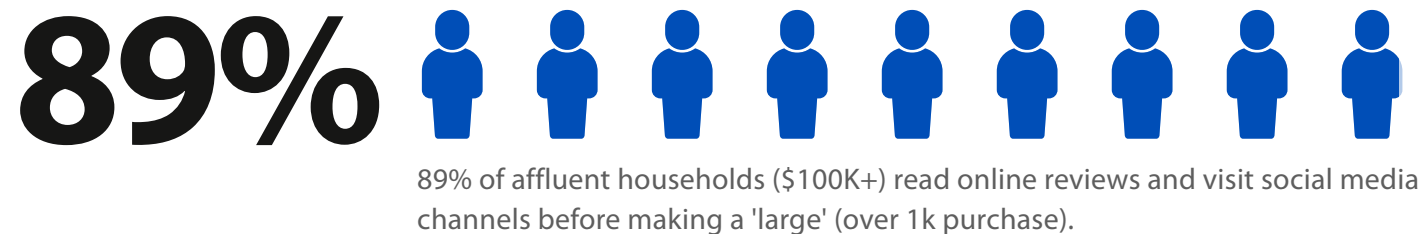


Performance Digital Marketing Agency

We deliver the ads that scales business and bring a depth of expertise in complex digital channels.



How digitally influenced are peoples buying behaviors?





What does this mean for you?

Digital Trust is the cog between **Marketing & Sales**

Your digital footprint is not only important for lead generation, but also vital for sales success.

Especially as your target demographic gets fueled by younger, more technologically savvy people.

People select you to guide their financial future because of who you are.

Your business should have a digital presence that extends that trust online.

Top Advisors Understand the Digital Transformation of Financial Advisory Services

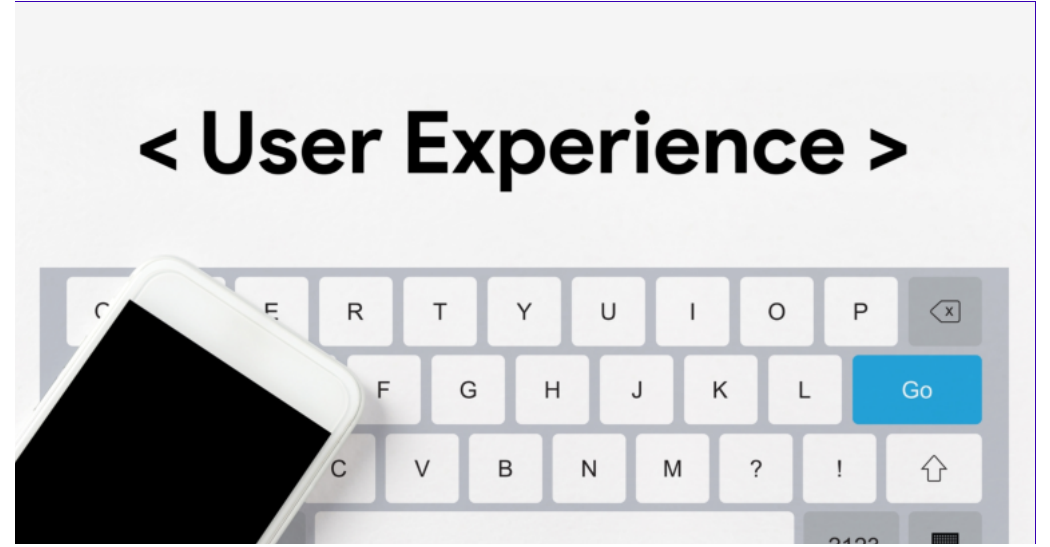
Build a digital presence that extends trust online. Leverage technology and marketing. Scale.



Website Design

A well-designed website can help to establish trust and credibility with users, which can be especially important for businesses.

Website pages with social proof or customer reviews bring 3.5x more conversions than those without.
(Bazaarvoice, 2018)





Digital Lead Generation

Meta Ads

Facebook and Instagram

233M

FACEBOOK USERS IN THE UNITED STATES

260M by 2027

52.6M

22.6% ARE AGE 55+

36.5% are age 45+ (85M)

Published by Statista on 8/2/23



Communication Plan

Email, SMS and chat bots.

41% of customers prefer live chat over phone and email support, or social media, even though 42% of businesses believe consumers prefer phone support (kayako 2022)



Social Media

Social media is already an important part of many digital marketing strategies, and it is expected to continue to be so in the future. Businesses will need to be active on social media to reach their audience and engage with them in real-time.

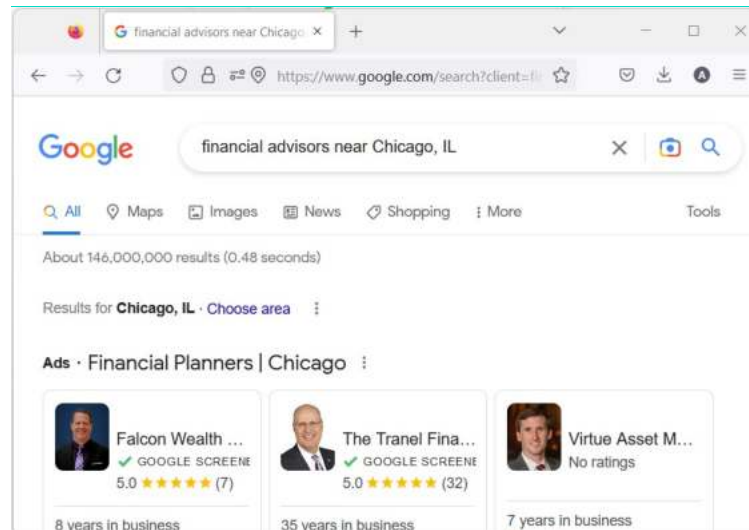
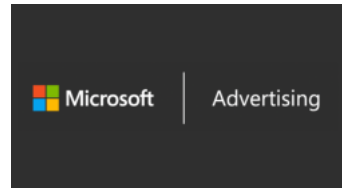
81% of consumers' purchasing choices are influenced by social media. (Forbes 2022)



Search Engine Visibility

Search engine optimization and paid search advertising allow you to dominate search results.

Nearly nine out of ten (88%) consumers make the effort to consult reviews when discovering a local business (Podium, 2021).

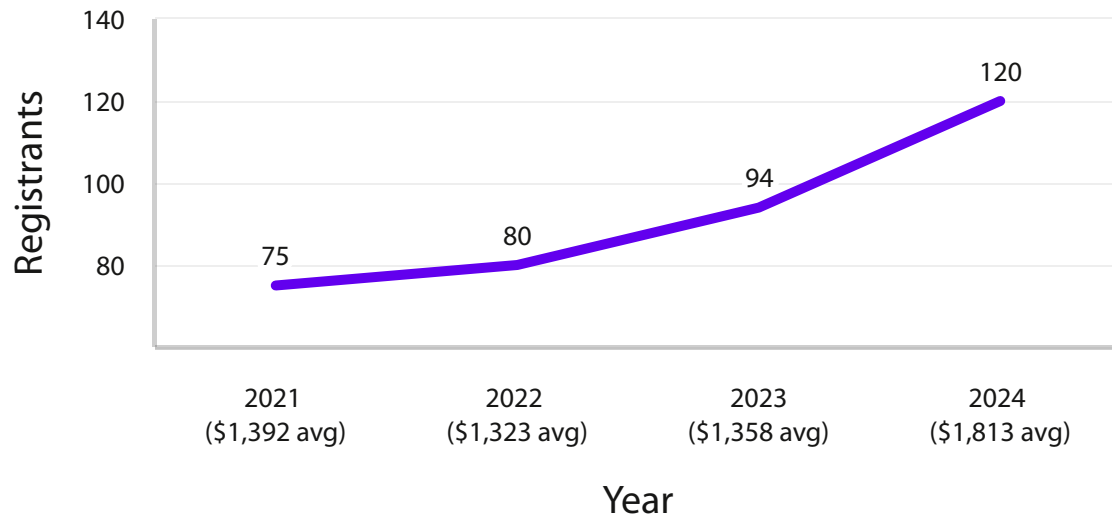


**How are webinars
trending?**

Webinar Trends: Marketing

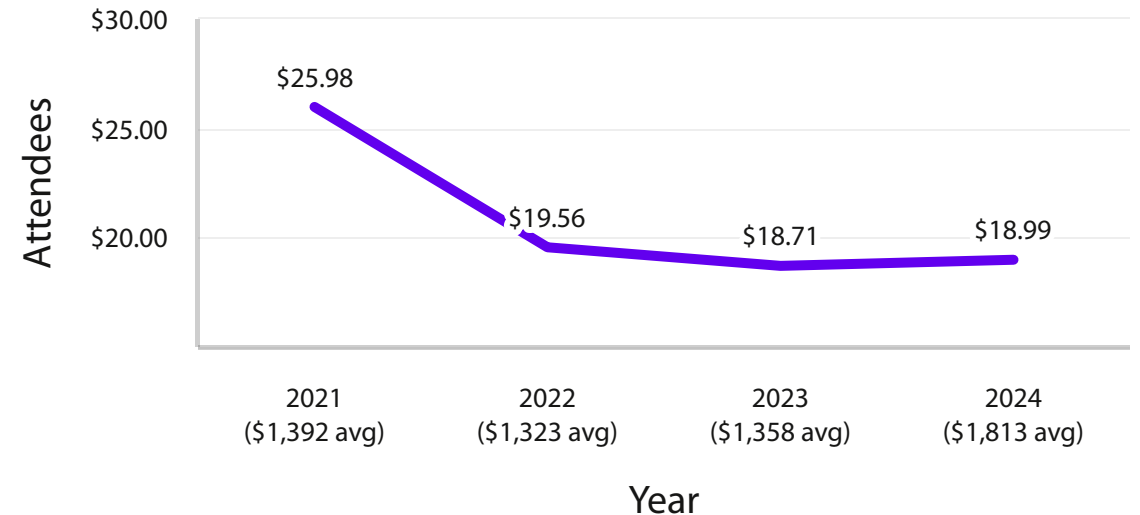
Digital Lead Generation. How results are created.

Average # of registrants per event



● Registered per event

Average cost per registrant



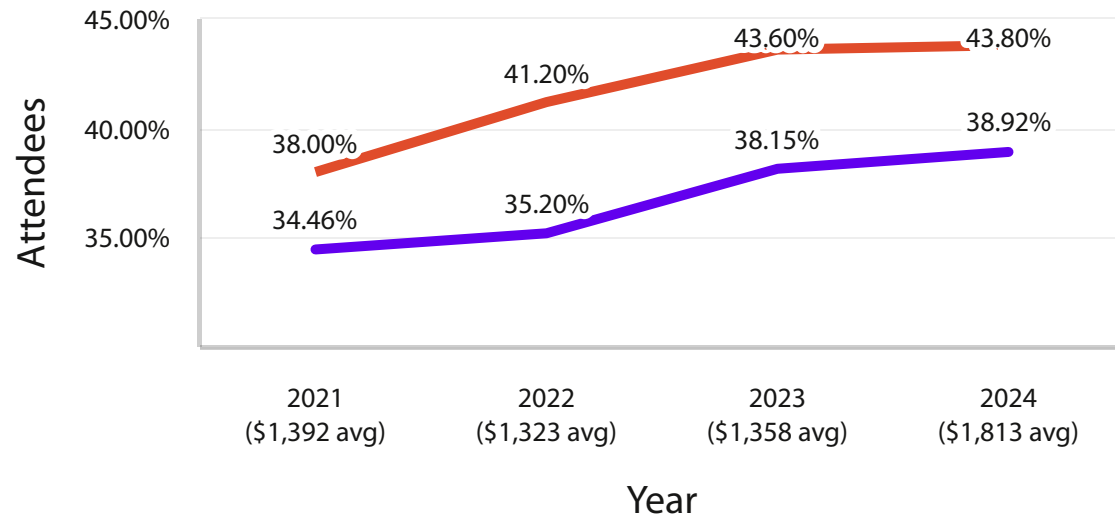
● Cost per registrant

Avg # of registrants **increased** from 2022 to 2023 by **17.5%** (44% YTD vs 2023)
Avg cost per registrant **decreased** from 2022 to 2023 by **4%** (17% YTD vs 2023)

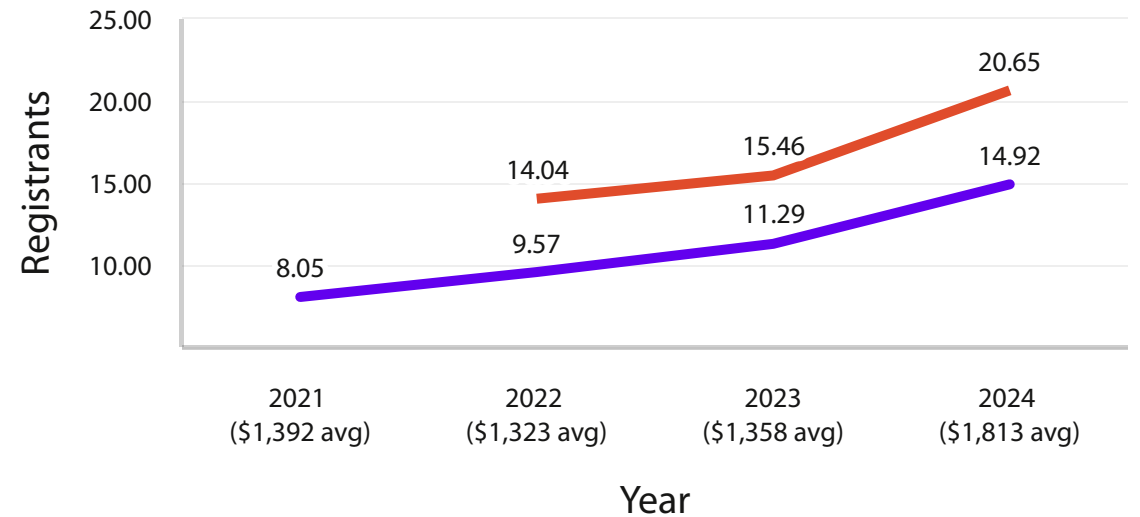
Webinar Trends: Event Day

Digital Lead Generation. How results are created.

Average Attendance Rate



Average # of CTA clicks per event



● Attendance Rate ● Top 10 Advisors by Attendance Rate

● CTA's per event ● Top 10 Advisors by CTA's per event

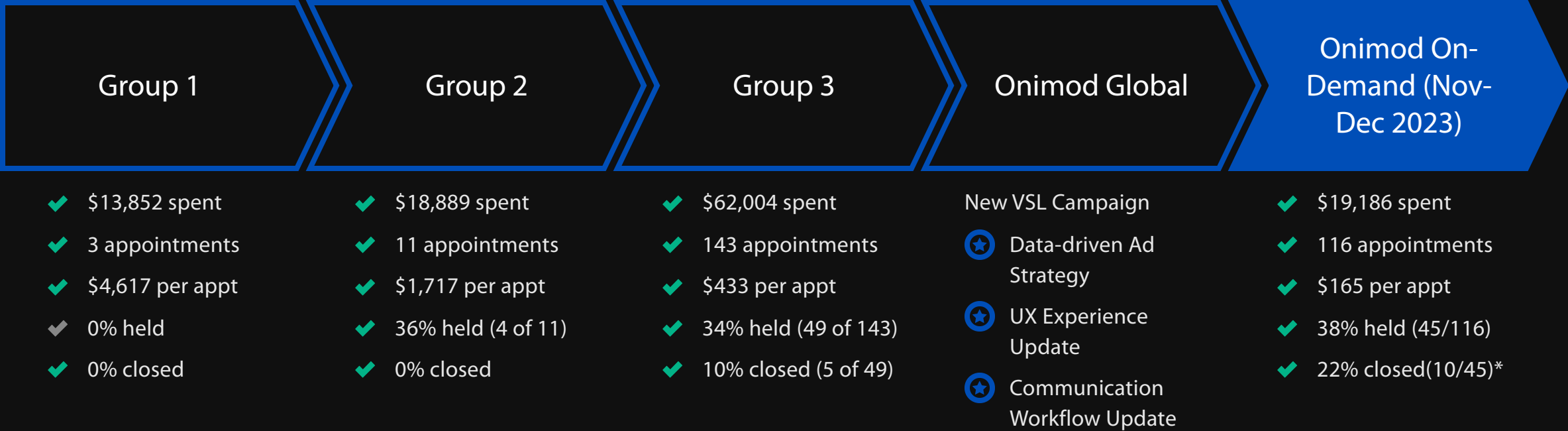
Attendance rate **increased** from 2022 to 2023 by **8.3%** (21% YTD vs 2023)
Avg # of CTA clicks **increased** from 2022 to 2023 by **18%** (62% YTD vs 2023)

**How well do other
campaign types perform?**

Case Study

We'll cover a case study from a nationwide financial advisory that breaks down campaign and ad types on Meta Ads.

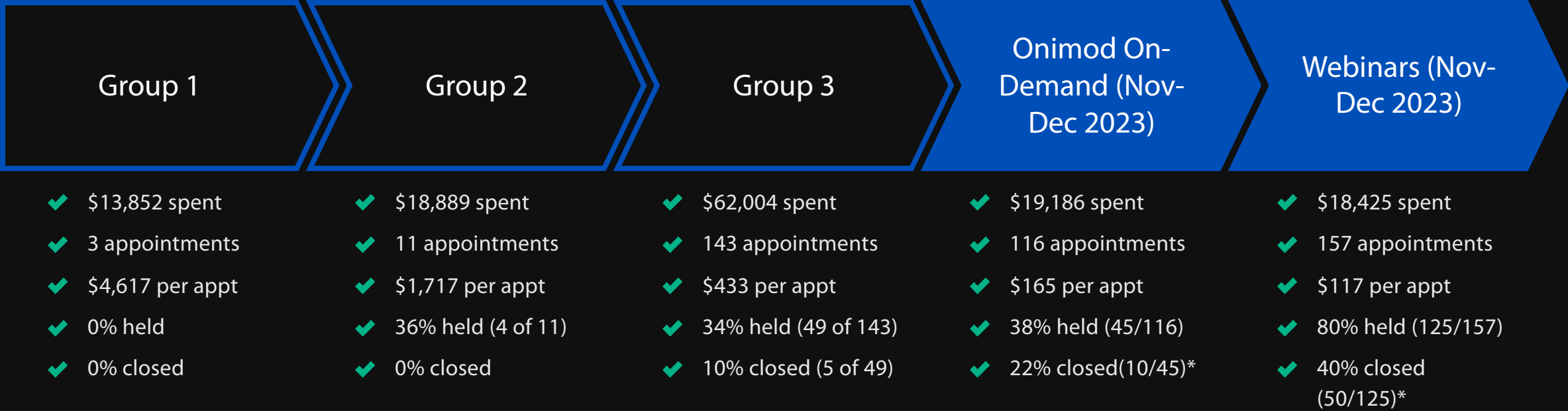
In our analysis, we delved into the performance metrics of live webinar and on-video sales letter (VSL) campaigns to uncover key distinctions in lead generation and conversions.



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**A/B Test: Positive vs Negative
Messages** at appointment
confirmation



Positive Messaging delivered 2x the
appointment held rate

Case Study Bonus Stat

Why prospects work with you

- **Motivate them**
Show prospects how you will help them achieve their financial goals
- **Show them Value**
Demonstrate how you can add value with your services and offer
- **Reduce Friction**
Make the customer journey smooth and easy
- **Remove their anxiety**
Address prospects' concerns to put them at ease
- **Build Trust**
Use your expertise to establish trust and credibility