

THE CHANGING EXPECTATIONS OF CLIENTS



InvestTech Conference
Nicole Smith, CEO/Founder, **Socialisd.com**



SOCIALISD.

WHO AM I?

- 25+ years working in financial services
- 10+ years learning and implementing digital marketing strategies with advisers and corporates
- Created social media campaigns for global food distribution businesses, fund managers, insurance companies, fintech's, advice practices, allied health practitioners and more
- I know how to create content that tells a story, engages and creates leads





Engaging and retaining

Social media marketing is
about **taking your business** to
your clients and prospects.

Not waiting for them to
come to you.



SOCIALISD.

HOW MANY
AUSTRALIANS ARE ON
SOCIAL MEDIA?



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20.5M



There are 25m+
people in Australia.

Source: Hootsuite

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DO YOU THINK **YOUR**
CLIENTS ARE ON
SOCIAL MEDIA?



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34.9%

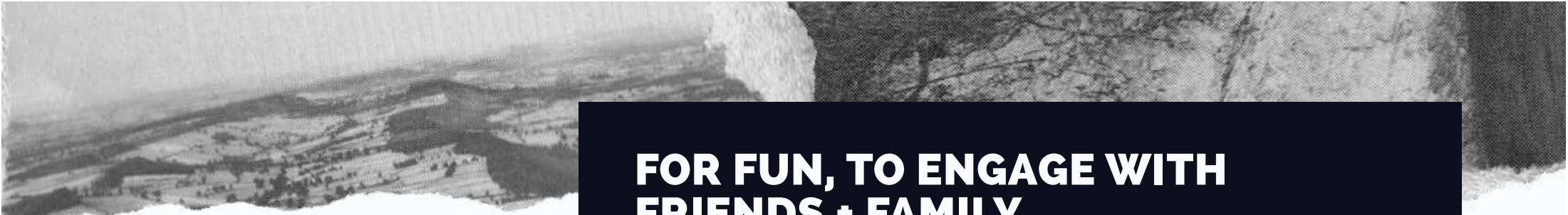
34.9% of 16-64 year olds
are using social media
as a **main source** of
information for
research.

They have on average
**7.2 social media
accounts.**

They are spending **1
hour and 46** minutes a
day on social media.

Source: Hootsuite

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WHY ARE
THEY
THERE?



**FOR FUN, TO ENGAGE WITH
FRIENDS + FAMILY**

RESEARCHING AND CONNECTING

**CONNECTING WITH THEIR
PROFESSIONALS**

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WHY SHOULD YOU CONSIDER USING SOCIAL MEDIA?

Let's discuss what has changed to make it
more important for advice practices than ever
before to be using digital marketing.

SOCIALISD.

WHY SOCIAL MEDIA?



17



The in-person
experience has
reduced.

Client
expectations have
changed.

An online brand
speaks to your
authority.

WHY SOCIAL MEDIA?



17



Valuations have changed and **brand** contributes.

Referrals are made via **digital** means now.

Storytelling is your way to be **different.**



Engaging and retaining

“Social media will help you build up loyalty of your **current customers** to the point that they will willingly, and for free, tell others about you.”

– Bonnie Sainsbury



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DO NOTHING

Don't market to clients, expect them to stay connected and be surprised when they decide to move to greener grass.

DO SOMETHING

Use social media to connect with clients, educate and storytell and drive potential leads to your website.

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KNOW YOUR
BEST CLIENT

10 PROBLEMS
THEY HAVE

SEEK CLIENT
FEEDBACK

OUTSOURCE
CONTENT



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Get a strategy



Create content



Convert leads.

HOW TO IMPLEMENT



Build a lead generation **machine** to
continue the growth of your business.

But remember to stay front of mind of
the ones who **pay you already**.

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WIIFM?

EDUCATE YOUR CLIENTS.

BE FRONT OF MIND.

GET MORE LEADS.

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THANK YOU!



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