



intention.ly

Get Your Story Straight

The 7 Stages to Build an Intentional Brand Message that Matters

This guide is designed to walk business owners and marketing leaders through a proven formula of seven reflective exercises to articulate and refine a brand message that **connects and converts with your ideal client**. The proven method provided throughout this guide is based on more than two decades of experience from masters of brand messaging in financial services.

Let's explore what it takes to build an intentional brand message.

STAGE 1



KNOW THE NEED (AND YOUR AUDIENCE)

Before you can ever establish a compelling brand story, you must first consider **where there is a need** in the world that you are best suited to address.

1. Who can gain most from the advice you provide?
 - Who has complimented your work in the most profound way?
 - Who comments or engages with you most on social media when you share advice or tips?
 - Who have you received a raving review from in the last six months?
2. Can you clearly articulate that challenge and the emotion your ideal client is feeling when they now they need help?
3. Where do those people typically go to for help or guidance?
4. Do these people share common demographic or psychographic traits?
5. Why do you understand their challenge better than anyone else?



STAGE 2



KNOW YOUR ROLE

The client is the hero. They want to feel main character energy! You are the guide. The sage. The secondary contextual character in someone else's story who arrives at the right time to help them overcome an obstacle or capitalize on an opportunity.

Whether you are a marketing leader, a CEO, or a member of your firm's leadership team, contemplate the very **essence of who you are as a company**, the mission you've set out to accomplish, the characteristics that make you different, and the way you materialize and deliver that value to your internal and external stakeholders.



Take this list of questions below, reflect on what is being asked, and draft your answers.

1. Whether you are a team of one or a legion of many, what set of common beliefs does everyone share that feed a larger mission for the company?
2. Is that vision clearly defined and where is it currently visible to the entire team?
3. Does this mission statement or value proposition or brand positioning statement speak directly to the need your clients have when seeking advice?
4. What do you want to be known for? This goes far beyond the question, "what do you do" and into the how and why behind your work.
5. Is there an aspect of your service offering that makes you genuinely unique from every other advisor in the country (*no, it can't be holistic advice, comprehensive planning, or diversified investments*)? Think more specifically about what your top 20 clients have said about the value they receive from you and how it is delivered.
6. Are you sought out for advice or guidance on a particular subject or topic, related or unrelated to financial planning or wealth management?
7. What kind of transformation do you create in people's lives?
8. What do people currently think/say about you? How are you getting access to this unbiased information/feedback?



STAGE 3



TALK ABOUT YOUR TOUCHPOINTS: IDENTIFY YOUR INTERSECTIONS OF INTERACTION

You can establish the most compelling story in the industry, but it means nothing if no one hears it. Consider the various **touchpoints, channels, avenues, and environments that various audiences come to know you.** These intersections of inspiration and activity are where the magic happens.

Take inventory of **every point of interaction** you have with clients and prospects. Let's start with your most engaged client over the next three months.



TIP: Consider frequency (*how often someone might engage with your brand*) and format (*what channels they use to consume information*).

CLIENT: JOHN SMITH	Frequency	JIT (Just-in-time)	Daily	Weekly	Monthly	Quarterly	Annually
FORMAT							
WOM							
EVENTS							
SOCIAL MEDIA							
EMAIL							
VIDEO							
PRINT							
WEBSITE							
WEBINAR							
ANNUAL REVIEW							
OTHER							

STAGE 4



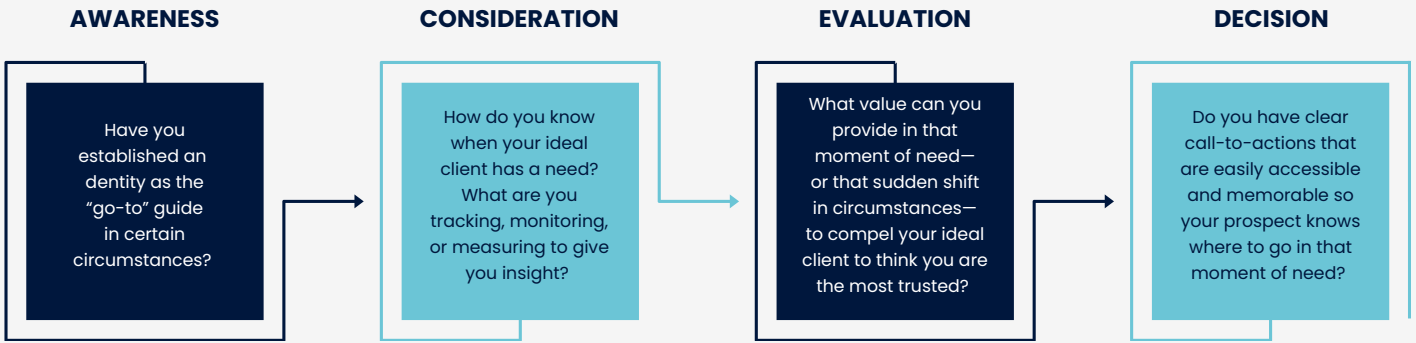
MOLD YOUR PIVOTAL MOMENTS

Humans make emotional decisions more than they make rational ones. Yet, our brand messaging and communications are usually designed with logic alone. In reality, we need to give more thought to how life events can shift a person’s perspective to make a decision in one moment over another. Think about it. As consumers, we want **1) to feel a connection** and **2) to have a conversation** when that surge of emotion hits at the moment of making a purchase decision.

Just as you attempt to anticipate your client’s life-altering milestones in their financial plan, you must also anticipate these life-altering moments in your marketing plan, to best serve that ideal prospect who has a need.



A few questions to reflect on, as you ponder the journey of your ideal prospect. How will you **make yourself known at key stages**, from awareness and discovery to consideration, evaluation, and the decision?



If you can mark these moments, anticipate the need, and confidently show up to the conversation from a place of visible value, you have a compelling brand—and the **best chance at winning a new client or retaining a current one.**



STAGE 5



NAIL YOUR NARRATIVE

This is where we bring all four previous components together to craft a compelling story. Of course, the art is knowing how to distill all of these insights and responses down to a series of statements that:

1. Makes the ideal client feel understood,
2. Outlines why you are the most competent and capable solution, and
3. Compels them on how to move forward in a seamless, simple way.

With more than 50 years of collective experience in helping financial advisors and fintechs refine their marketable message, here's the formula we recommend:

- Start with who you are and what you believe,
- Lead into how you deliver what you believe,
- Describe who will benefit most from this value provided, and
- Close with the transformation you create in their life.

Now, give it a try for yourself:

We _____
for _____ who believe _____
so you can _____.

Another way to phrase this:

We are the only _____ that _____
_____ for _____
to help them _____
in _____.

The key to a succinct, compelling positioning statement or mission statement is to include the challenge or struggle they're experiencing—and then **speaking directly to how you help them solve that challenge with tangible value**. It's about constantly reminding your prospects—and current clients—of the comparison between where they are now (current state) and where they could be (ideal state) if they had your guidance and support.

STAGE 6



AMPLIFY YOUR STORY

You've taken the first step in refining a compelling value proposition for your brand. You have a spark that gives you a sense of identity. The next logical step is **understanding how you leverage multiple channels** to take this newfound identity to the world.

This is where a marketing strategy can get unnecessarily complex. There are countless ways to reach your ideal client in the modern era of marketing, but you don't need to tackle everything everywhere all at once. Start with first considering online and offline channels. Choose 2-3 channels for each and lean into them to start.

For example, here are some of the most leveraged channels in each category. Master two or three of each, and then you can think about everything else all the time at once.

ONLINE CHANNELS

- Website
- Social Media
- Webinars
- Paid Ads
- Video
- Client App / CX
- SMS Texting
- Blog
- Press Releases

OFFLINE CHANNELS

- Events
- Word-of-Mouth (WOM)
- COIs
- Leveraging Referrals
- Print Collateral / Mailers
- Swag
- Billboards
- Print Publications
- Inclusive Experiences

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If you are intentional and strategic, expanding your brand doesn't have to be overwhelming. Look at your calendar for the year, and see how these channels could be used to stay in front of your prospect or client on a regular cadence. In financial services, we've found that it takes up to **13 interactions with your brand** before you should expect anything in return. **Choose the channels that pack the most punch.**



TIP: Look at your content calendar for the year. Identify a quarterly theme that ties back to your chosen channels and ideal prospects, and **create a storyline with these four themes** (one each quarter) that resonates with your audience. From thought leadership pieces and downloadable materials to events, seminars, and annual reviews, consider how you show up in these moments. How are you tying each quarterly topic theme back to your **brand's mission and value proposition?**

STAGE 7



FOREVER FACILITATE FEEDBACK

This final step is one that nine out of ten financial firms forget. Without staying close to the opinions, feedback, preferences, and priorities of those you serve, you really have no direction, no focus, or priority as a business or a brand. Our industry is full of fast-growing firms, but oftentimes those same firms are the ones who lose touch with their clients and forget how to sustain an authentic connection with those they aim to serve. Growth for the sake of growth just doesn't hold up over time.

As consumers, we all have a deep-seated need to feel understood. It's as biological as it is sociological. Which is why every intentional brand needs a way to nurture an ongoing conversation. Think of the various ways you ask for feedback or input: annual client satisfaction surveys, conversations during annual reviews, quarterly polls on social media, a CTA in your email newsletter, or an advisory council with your top 20 clients. **Whatever the format, ask with intent.**

BE A BETTER CONVERSATIONALIST



1. Define the objective: Tear up those old survey questions and rethink your strategy. What type of feedback will help us identify company goals, focus areas, or pivots we need to make to elevate our offering? Who should these questions go to: clients, prospects, your own team, or all three?



2. Ask open-ended questions: Open-ended questions encourage participants to answer in their own words, which can be very insightful data for future brand messaging.



3. Choose channel and format: Depending on the size of the survey or the format, consider what will get the most engagement. Can you add three questions to every client meeting to get a frequent pulse of sentiment? Maybe you promote a one-question poll on LinkedIn or X to get some fast feedback. Maybe you decide to send an online survey that takes less than 10 minutes to complete with an incentive to drive responses. Or, you equip your service and ops teams with a single question they ask anytime they conclude an inbound call from a client. There are so many ways to collect valuable data in these micro-moments, but so few do it.



4. Incentivize participation: Think of what will motivate someone to take a few minutes out of their day. Is it a drawing for a gift card? A chance to provide a pay-it-forward financial plan to a friend? A written promise that results will be shared with all clients? You'd be surprised how many incentives don't involve a battle with compliance or a budget.



5. Close the loop: One of the biggest mistakes financial firms make is simply not communicating what they do with the feedback they receive. By establishing a solid post-survey communication plan, you reinforce trust with clients and prospects and, more importantly, motivate them to continue engaging with the firm. Nothing is more powerful to brand advocacy than asking for input and communicating the results and outcomes in response to that feedback.

These five steps are the often-overlooked elements that make or break your ability to create a lasting impression and retain clients for a lifetime. Companies that embrace the art of **making their message matter** become the brands that **connect and convert**.



BE A BRAND THAT WONDERS

who it could be and how it adds value



NOT A BRAND THAT WANDERS

aimlessly with assumptions and distractions

*"If you can't articulate **who you are, what you believe, and what you stand for**, someone else will. That's the jarring reality—and a responsibility I wouldn't entrust to anyone else's care but your own."*



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Need help getting your story straight?
We're here for you.

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