



## How Connection Will Fuel Your Growth in Future

October 3, 2018 By: Julie Littlechild

We all crave connection. This has always been true in our personal relationships however it seems that this basic human need is creeping into our professional relationships as well. Today we also look for connection with the brands and organizations with whom we work.

The shift to connection has changed how we market forever and for the better.

To get it right and to create meaningful connection we need to be more open, more personal and more vulnerable. And depending on your outlook that's either a welcome and refreshing change or strikes fear in your heart. Either way, you'll need to respond to stay relevant.

The challenge, of course, is figuring out how to adjust. How should we be communicating with prospects and clients? What form should that communication take? What should we be sharing, without over-sharing?

There are two trends that have emerged that should, I believe, cause any advisor to sit up and take notice. The first is a shift toward 'thought leadership' and the second, related, is a shift toward the use of video. The first is critical because it allows you to expand your reach and add value without feeling creepy. And the second is critical because it holds out the potential to create real connection between you and your prospects.

With these personal views as context, I was interested to see that [Marie Swift](#) and [Maribeth Kuzmeski](#) had launched the [Advisor Thought Leader Summit](#), an event that Marie described as "media training on steroids." (Nice touch.)

Because knowing you should do something is very different from knowing how to do something and still more different from having it done for you, I thought it was a really interesting idea.

I asked Marie if I could interview her about the marketing strategies that will help advisors stand out and how we can get over ourselves long enough to use tools like video as a way to take action. By way of background, Marie is President and CEO of Impact Communications, which is a full-service PR and marketing communications firm that works solely within the financial services industry.

***Julie – I know you help advisors become thought leaders. Can you start with a quick definition of what that means?***

Marie – According to Dictionary.com, a thought leader is “one whose views on a subject are taken to be authoritative and influential.” Russ Alan Prince and Bruce Rogers, co-authors of *Profitable Brilliance: How Professional Services Firms Become Thought Leaders*, take it a step further to say: “A thought leader is an individual or firm that prospects, clients, referral sources, intermediaries and even competitors recognize as one of the foremost authorities in selected areas of specialization, resulting in its being the go-to individual or organization for said expertise.” They go on to say that “Thought Leadership is the key point of differentiation for professional services firms and the true path to superior profits.” To add to those two good definitions, I’d say that a thought leader is one who does more than just master a particular subject; while “subject matter experts” and competent professionals are to be appreciated, “thought leaders” are committed to advancing the conversation – and even pushing the boundaries – when it comes to a particular line of thinking or inquiry. Thought leaders challenge the status quo, not just for their own business results or for egotistical reasons, but to serve a higher purpose.

Examples of thought leaders in business today include Elon Musk and Daniel Pink. Examples of thought leaders in the financial services industry include Bob Veres, Carolyn McClanahan, James Dowd, Aaron Spradlin, Steve Wershing, George Kinder, Bill Bengen, Meir Statman, and Bert Whitehead. I’d also put you, Julie, in our finserve thought leader circle.

***Julie – That means a lot that you’d put me on the same list. So exactly how does a thought leadership strategy help an advisor grow his or her business?***

Marie – When a professional is seen to be ethical, highly competent and appropriately credentialed, people tend to respect that person for their acumen and commitment to their craft. That's step #1 – you can't become a thought leader without a strong reputational foundation. But beyond pure competence and respect – which is pretty great in and of itself – there is a whole new level of meaning and participation. We start to perceive people as thought leaders when we sense there's something more happening in their world – and in the lives of others as a result of their extra commitment. They seem driven, but not just for personal gain.

Thought leadership requires a different level of passion and commitment. It takes more time and energy than simply mastering the art of financial advice or investment management. There's more underneath the surface. It's this deeper passion and commitment that people not only see but feel that creates a whole new level of respect. When people see your good works and also feel your true intention to advance a body of knowledge, they can't help but draw closer to you – assuming they have similar values to yours, that is.

What happens is a sense of magnetism. When there's a sense that "you're up to something" – something larger than yourself – people want to know what that's all about. They may even want to be a part of that "something good." All sorts of allies come out of the woodwork to support the cause, sing your praises, and cheer you on. Those are the best kind of cheerleaders to have. They totally get who you are and what you stand for. And they're very happy to tell others about you and your mission.

There's a feeling of altruism and benevolence that bonds those relationships and shifts perceptions of who you are as a truly authentic human being, even for people who don't really know you in person. They may have only heard of you, read about you, studied you. Still, you inspire and motivate people without, perhaps, ever really knowing it. You may even be seen as famous in a particular circle of people. Others who are up to something larger than themselves will start seeking you out.

Bottom line: Thought leadership goes beyond the typical business agenda. And this is where the magic occurs. Business is not a struggle and good things just seem to happen more often than not for these committed, grounded and altruistic souls. Their business dealings tend to become frictionless, at least in the right circles; and because they are in high demand, they can be more selective and can charge more for their services and expertise.

***Julie – So let’s assume an advisor wants to become a thought leader. What are some of the skills he or she needs to have, or to learn?***

Marie – Becoming a thought leader will require some serious thought. They will need to think hard about the profession as a whole, their business more specifically, and the people they serve with a passion—not just once in a while but all the time.

They will need to converse on a regular basis with others they consider to be thought leaders and even celebrity thought leaders. Part of the fun will be shaking the mental cobwebs loose together.

They will need to write down, internalize, and then share those insights with the world. They can’t just repeat what others have repeatedly said; they must advance the conversation with their thoughts and opinions.

They’ll need to be vulnerable, put themselves out there, and take some risks. This means having a clear point-of-view and taking a stand on important matters such as fiduciary standards, fees, conflicts of interest, business models, personal ethics and so forth.

They’ll need to practice the art of storytelling, and be seen in the company of other thought leaders. If they are playing a role alongside others who are considered thought leaders or simply supporting their cause, advisors should use photos and videos, blogs and social media posts, emails, and mentions in their subsequent speeches and one-on-one conversations.

Finally, they need to embrace their ability to win friends and influence people, and step into the spotlight. Being in the spotlight can be scary, but embrace it they must. Presence is also important, so they will need to master the “three L’s” – look, language and leadership.

***Julie – I really want to talk about video. What role does video play in becoming a thought leader or in engaging with clients or prospects?***

Marie – Video, much like a carefully-crafted personal appearance, gives financial advisors a way to be seen as a caring, competent professional. A good video can build trust, while moving and inspiring the viewer. Even the process of preparing for a speech or video presentation can help the advisor anchor key thoughts and perfect the articulation of purpose and value.

In today's noisy, digital world, every advisor must learn to be comfortable – and even passionate – in front of people and in front of the camera. Much like having a really good still photo, having a really good, short video helps the viewer get a sense of who you are – and determine if they could potentially put you in a position of trust.

I've met many advisors who have the potential for becoming a thought leader and, in turn, influencing more people; but they are afraid to step into the spotlight. A true thought leader knows it's not really about them anymore – it's about inspiring others and serving the greater good.

***Julie – If an advisor hasn't done video, what is the one video that is most important to create?***

Marie – A good passion video is the one digital asset that every advisor must have if they want to stand out from their competition and attract more – and better – clients. A good video can also anchor existing client relationships and impress centers of influence.

Every advisor needs a short video to put on their website that explains in two minutes or less who you help and why you do what you do. It's "the why" – not "the what" or "the how" that will create gravitational pull. Purpose and authenticity can attract the right people into your life – and that includes clients and strategic partners, as well as partners and staff.

***Julie – Once they have that video, how can an advisor use it to drive exposure and/or growth?***

Marie – The best place to put a short passion video is on the home page or the "about" section of your website. It can also be used on Facebook, LinkedIn and Twitter as a foundational element. Video is shared twelve times more often than text and links alone, so it has the potential of taking on a viral life of its own. Don't be afraid to "pin" your signature video to the top of your social media accounts. Video posts can also be "boosted" on Facebook or used in a paid advertising campaign on LinkedIn or Twitter. You could even put a link to your video with a concise call-to-action in your email signature.

If you get into the habit of making short videos using your webcam or even your smartphone, you can create a string of compelling educational videos that can serve as a supplement to traditional, written blog posts. You could also start a YouTube channel as a way to reach more people and come up higher in search engine page rankings. If you create a monthly or quarterly newsletter, videos can be a part of that communications strategy, too.

***Julie – What are the big mistakes that you see advisors making when it comes to video? By the way, I’m sure I’ve made them all.***

Marie – Poor lighting and sound quality are the biggest turnoffs for viewers. It’s usually not the camera quality per se. If you are going to do your own videos, do yourself a favor and buy a \$20 lavalier microphone that clips onto your lapel and plugs into your smart phone or handycam. Standing or sitting with a natural background behind you – and a full window’s full of natural light illuminating your face – is the best way to look good.

Planning ahead, using a prop and being a little extra animated can also help to keep people’s attention. Keep it short and lively. Don’t drone on and on.

***Julie – Let’s deal with the elephant in the room. What would you say to someone who is petrified about being on camera?***

Marie – The best way to get comfortable in front of the camera is to, as Nike has famously said in their advertising campaigns, just do it.

Just like public speaking, it takes courage and the ability to let your passion, purpose and mission carry you through whatever body feelings and self-concerns you have. Preparation, practice and experience reduce fear.

Getting some help from an experienced friend or professional coach with your script and “presence” skills can also help reduce the jitters.

Talking – or shooting – in front of a friendly audience is also a great way to build confidence.

Another trick I’ve used when I felt nervous or fearful is to close my eyes, breathe deeply and imagine myself as one of my more courageous and outgoing friends who is always articulate and charming – especially in front of an audience. I also sometimes repeat this silent mantra several times: My mind and my mouth work perfectly today; I know just what to do, I know just what to say.

Then the only thing that’s left is to just get out of your own way— and just do it.

***Julie – You’re doing something really different with ‘done for you’ video for advisors. What led you to create the Advisor Thought Leader Summit and, in particular, to make the video component available for advisors?***

Marie – About ten years ago, I started experimenting with providing media training, PR and content creation services to groups of like-minded financial advisors who split the costs and shared their best ideas in a non-competitive, virtual setting. One of my first group programs was called PR Mastermind. Later I created Media Mastery University. Those were great programs for the time – and of course we still delivered private client services as well.

But today, given how important it is for financial professionals to get comfortable in front of the camera and ramp up their public presentation skills, it makes sense to get a small group of advisors together in one room, so they can not only benefit from the group dynamic and the shared cost savings but so that they can also benefit from professional services – such as done-for-you video – and professional coaching/services (including hair and makeup, if desired) to help them look and feel their best in front of the camera or a live audience.

So, I came up with this idea to do something called The Advisor Thought Leader Summit. I approached another marketing professional, Dr. Maribeth Kuzmeski, who has a slightly different focus working within the financial services industry than I do, to add extra energy and insights. We intentionally searched for a university setting as a way to lend even more credibility to participants and were lucky enough to secure the University of Chicago Gleacher Center for November 9 and 10, 2018. We started enrolling others in our vision and eventually came up with an all-star cast of speakers and trainers who will be with us, live and in person, for The Advisor Thought Leader Summit.

To our knowledge, this type of “media training on steroids” has never been done before within our space. Not only will we be teaching and “modeling” good presence and speaking skills for the audience but we will actually get some work done during the interactive workstations experience one of the afternoons.

Everyone will get photos with our highly-respected faculty. Everyone will get a short video interview with our television personality. Everyone will get a news release template to customize and use as their own – something that they can use to send to their local media outlets along with their short video talking about who they are and how they help a select clientele. And, if they sign up by October 9th, they will also get two Early Bird bonus incentives: a custom-built media list for all the appropriate journalists within a 50-mile radius of their office and a 1:1 pre-event call with Dr. Kuzmeski to talk about their messaging for their video interview.

For those who are ready to tell more of a “personal journey” story, we are offering the option of crafting and shooting a longer “thought leader talk” – something that will look and feel similar to a TEDx talk and reveal their character, passion and purpose in a deeper and more meaningful way.

The entire experience has been intentionally crafted to put a select number of advisors in the spotlight, in a safe and supportive setting with professional help at every step of the way, so that they walk away with not just an experience and new tools but a suite of digital assets that can help them move to an even higher level of success.

***Julie – I love to see things being done differently and, of course, well. I'd put this in that category. It's so difficult to make the connection between the theory and action but I think that's what you're doing.***

Marie – Thanks Julie. We are happy to offer a special rate to your readers, Julie, and hope that you'll be able to join us in the future.

I loved talking to Marie about this and love it even more than she's offered a discount if you're interested in participating in the [Advisor Thought Leaders Summit](#). If you'd like to learn more or register, just go to [www.advisorthoughtleadersummit.com](http://www.advisorthoughtleadersummit.com).

You can use the code **LITTLECHILD30** to get the discount.



#### ***About Julie Littlechild***

A speaker, writer and researcher Julie founded AbsoluteEngagement.com with a mission to help financial advisors to intentionally design businesses that support the lives they want to live (and the lives that fuel their capacity to succeed). From 2010–2013, she sat on the national board of the Financial Planning Association and was named one of the 25 most influential people in financial planning in 2012. Julie is based in Toronto and works in the US, UK, Europe and Canada. She holds an MBA from the University of Toronto.

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