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A complex, abstract background of glowing blue and green lines and dots, resembling a digital network or circuit board.

Connecting Meaningfully With Clients in the Digital Age

The CDFA's Marketing Challenges



- Generating business is considerably different from providing financial advice
- You want to develop your practice
 - in a way that isn't predatory
 - in a competitive environment (growing CDFA pool)
 - without full knowledge and skills (possible distaste, uncertainty or fear of the marketing process)

Your Opportunities

The Client

- Typically searching desperately for support
- Vulnerable
- Unprepared to pay legal fees
- Bringing attention to your services falls within the bounds of good taste

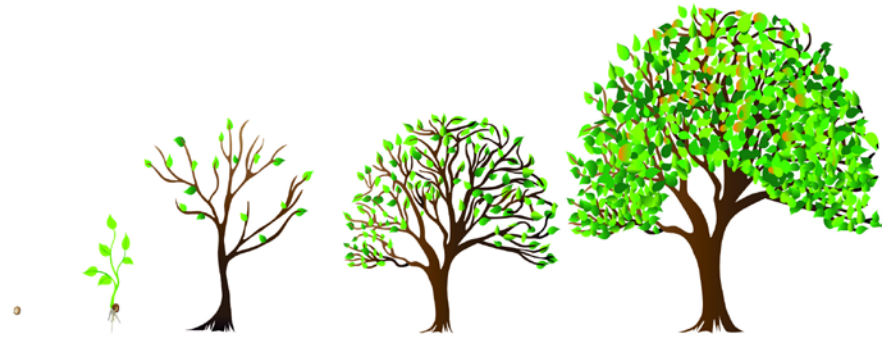


Numerous Methods

- More than 50 marketing methods
- Which are appropriate?
- Which are effective?



It's a Process



Marketing = communicating in a strategic manner

- Calls for you to have some form of online presence
- But financial analysis doesn't lending itself particularly to online; it's a relationship business
- No technology can convert prospects into clients and then serve them effectively

Don't expect instant gratification

- Takes time (weeks, months or years) and requires patience
- Your goals and measurements of success should be
 - **relationships**
 - **reputation**
 - **awareness** and **understanding** of your service offering
 - **conversion** of prospects into loyal, trusting clients who pay on time, pay optimal fees, use extended services and refers your services to others

Step 1: Research

Identify and know your target audiences through informal interviews and surveys.

Desired Clients

Who they are (age, occupation, etc.)

Where they are (lifestyles and habits, including online habits)

Referral Sources

Who they are

How the wider community perceives you



Market and Social Intelligence

Example Insights (2016)



- Divorce rate for couples age 50–54: 38%
- Divorce rate for couples age 55–59: 47.8%
- Divorce rate for couples age 60–64: 31.7%
- Average age of men at divorce: 44
- Average age of women at divorce: 41
- Same-sex couples who are married: 16.5%
- Divorces initiated by women: 66%
- Busiest month for divorce: January
- Canadians who represent themselves in family courts: 80%
- One reason for self-representation: Unaware of arbitration, mediation and collaborative practice

Step 2: Awareness Tactics

Website

- **Your mainstay!** 74% of people seeking professional advice run online searches and then make telephone contact (CDFA interviewees: website generates 70% to 75% of business)
- Understand SEO
- Speak plainly to clients' concerns and questions
 - authentic, sincere and empathic language
 - difference between a CDFA's expertise and a lawyer's services
 - affordable, reliable and trustworthy
- Visually appealing, clear and helpful
 - full contact information on your home page
 - links to helpful content
- Self-serve web builders: [websitebuilderexpert.com/website-builders-comparison-chart](https://www.websitebuilderexpert.com/website-builders-comparison-chart)

Social Media

- Social content should stay fresh and current – requires significant commitment and focus
- Don't participate if you don't have the proper time, inclination or knowledge
- Learn the riggings and trappings (e.g., udemy.com)
- Use it to watch your target audiences and propagate your content



Referrals, Cooperation and Partnership

- Establish reciprocal relationships with family lawyers, mediators and therapists
- CDFA interviewees: formal referrals and word of mouth generate 25% to 30% of business
- Consider providing services jointly with companion providers and even competitors

Thought Leadership

- **Authoritative** and **educational content** highlights your expertise, builds credibility and enhances word-of-mouth recommendations
- Examples: articles, blog pieces, op-ed pieces and bulletins (e.g., <http://www.fairmore.ca/situations-demanding-a-cdfa.html> and
- Highly shareable, and valued by journalists and conference organizers
- Monitor engagement with analytics tools
- Attend networking events, conduct seminars, speak at conferences and engage with the media

Interpersonal Communication

- Develop a relationship mindset
- Obtain training in skills that build rapport and trust (personal warmth, empathy, listening, etc.)

Step 3: Get Competitive

Competitive Intelligence

- What are your competitors doing and not doing?
 - Market yourself differently (e.g., outprice your competitors or find places in the market where your competitors are absent)
- What topics are resonating with your audiences?
 - Monitor industry buzz and media coverage (e.g., which journalists are writing about your competitors?)

Service Pricing and Bundling

- Divorcing people are price-sensitive and appreciate predictability
- Offer true value for price (e.g., flat fee for initial meeting)

Signage and Office Space

- First impressions matter! Signage and exterior have a continuous 24/365 effect
- Convey your desired image, style, professionalism and quality of service
- 75% of consumers enter a business for the first time visited based on signage

Step 4: Meaningful and Lasting Connections

Treatment of Prospects

- Gear your tone and processes to your prospects' needs
- Reflect the value and confidentiality that you place on client relationships
- Seamless and simple intake process
- Monitor, track and follow up on leads

Commitment

- Be prepared to provide best-in-class service and overserve your clients
- Anticipate clients' issues and proactively communicate
- Maintain constant, tailored communication
- Ask for referrals and testimonials

Ongoing Metrics

- What is and isn't working? (e.g., Which leads convert to clients? What is your no-show rate?)
- Use Excel!
- Hone your processes

This is
about
YOU



Q & A

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