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10 Keys to Putting Credibility Marketing to Work

CEG Worldwide finds elite advisors are SMART about accountability, teamwork and execution.

SAN MARTIN, CA—January 19, 2011—CEG Worldwide, the leading coaching, consulting and research firm for elite financial advisors, has announced new research identifying the strategies most frequently cited by top-performing financial advisors to effectively execute credibility marketing, thus becoming recognized authorities.

“Even after having narrowed their focus to the best methods for their businesses, it’s still common for advisors to feel overwhelmed about credibility marketing,” said John Jr. Bowen Jr., founder and CEO of CEG Worldwide.

However, CEG Worldwide researchers have discovered that the highest-performing wealth managers have 10 common strategies for implementing effective thought leadership marketing initiatives.

Top 10 Actions Advisors Can Use to Implement Credibility Marketing

1. Set your overall goals and strategy.

Identify the specific goals that you want to achieve with your credibility marketing and determine exactly what you will do to achieve them.

2. Review your existing marketing materials.

Determine whether they adequately support your marketing strategy.

3. Perform a SWOT (strengths, weaknesses, opportunities, threats) analysis.

What does your business do well? Where is it not succeeding? What are the opportunities in your niche? What could threaten your practice?

4. Write and produce a positioning package.

Describe in detail the benefits to members of your niche market of working with your firm—the expert in addressing their needs.

5. Create or update your Web site.

In this wired age, most financial advisors find that this is an absolutely critical step.

6. Research and contact media resources.

Through your centers-of-influence interviews and discussions with ideal clients, you should familiarize yourself with the publications that your niche market reads and respects.

7. Write and publish articles and distribute reprints.

This will provide you with broad-based credibility. Your articles will become the proof statements of your expertise.

8. Create an email newsletter.

This is an easy and cost-effective way to stay in touch with clients and prospects in your niche. As you update your Web site, build in a newsletter subscription function.

9. Conduct private client events.

These can be a key marketing tool for enhancing your credibility while bringing in qualified prospects.

10. Write and publish white papers.

These are very powerful and, with the right writing assistance, not that hard to do. They will take your credibility up another notch, establishing you as a true authority in your area.

“There are lots of opportunities for your team to support credibility marketing efforts,” said Bowen. “Decide early on who on your team will accomplish each task and execute it! Once you have a clear plan, move forward without hesitation. You can always refine your efforts later; the important thing is to get started.”

About CEG Worldwide, LLC

CEG Worldwide is passionate about coaching financial advisors and institutions to build a Simple and Elegant Wealth Management BusinessSM. Using state-of-the-art research methodologies and analysis combined with proven strategies and tactics for building highly successful advisory practices, CEG Worldwide provides uniquely powerful insight into what allows elite financial advisors to thrive.

CEG Worldwide delivers fully scalable financial advisor training programs at many of the world’s largest financial institutions. The firm’s proprietary institutional strength intelligence is based upon empirical studies of more than 10,000 advisors and 14,000 high-net-worth individuals. By combining research expertise with pragmatic and proven business experience, CEG Worldwide helps institutions achieve measurable gains in productivity, retention and assets under management and provides advisors with proven business-building strategies and tactics.