

**TELL IT WELL** 0.8

# Content Marketing for Financial Services: The Case for Funnel Vision

For financial firms, content marketing can be an effective means of raising awareness, moving prospects through the sales funnel and ultimately converting them into clients. But it's not a simple matter of pumping out a firehose stream of market commentary into the marketplace and hoping some of it will find its target.

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To realize the maximum return on your content marketing investment, ultimately measured in client conversions, it's essential to develop content for prospects and then reach them at every level of the sales funnel. Consider these tips:

**O Start out with a roadmap.** Financial professionals are famously compulsive about strategy—articulating a long-range goal for their clients and then meticulously crafting a plan for achieving it. Yet relatively few approach content marketing with the same strategic mindset. Nearly two thirds of asset management firms surveyed by the Mutual Fund Education Alliance said that

their biggest content marketing challenge was developing an effective strategy; more than a third reported having difficulty using content to its fullest advantage.

A successful strategy begins with mapping the client journey through the five stages of the sales funnel—awareness, interest, consideration, decision and action—and creating content specific to each stage. For example, market commentary might be right for a potential client in the awareness stage, while an article on “things to think about after your kids’ college is funded” may be better suited for someone further down the funnel.

**O Know thy audience.** Your content will likely fizzle unless you know precisely whom you're targeting—their demographics, aspirations, values, goals and pain points. A thought leadership piece on IRA withdrawal strategies might well capture the attention of people approaching retirement but would likely have little relevance to millennials. In some cases you might use content to target a prospect at a specific moment in time—for example, a person who is newly divorced and rethinking his or her financial planning needs, or a corporate executive looking for guidance around investing a year-end bonus.

**O Focus on value, not sales.** At the top of the sales funnel, the content most likely to resonate with prospects will educate, rather than promote. People intrigued by cryptocurrency, for example, and wanting to know more may value an informative, brand-agnostic article on the topic. Further down the funnel, where prospects may be seriously considering investing in crypto, more focused content that references your specific product offerings and solutions, would be appropriate.

**O End with a call to action.** At whatever point in the sales funnel you connect with a prospect, your content should end with an explicit and compelling call to action. Typically, a CTA is in the form of a message or prompt designed to elicit a response—i.e. to get readers to do what you want. Early in

the customer journey, it may be as simple as a “Click here to read more” button. A step further down, you may ask them to “Download whitepaper” or click a link that sends them to your website or connects them to a webinar. Further along, you may encourage them to contact you directly via phone or email. The important thing is that the CTA be clear and can't-miss visible, and that it offer the reader a tangible benefit—a reason to act.

**O Measure your results.** You've invested the time and money in creating a great piece of content. But what's your ROI? How many people are actually reading it—and of those, how many are responding to the CTA? The measurement techniques you use will change as you move down the funnel, starting at the top with CPMs—cost per thousand of readers—and metrics suited to the middle and bottom of the funnel—i.e., the length of time readers spend on your article, CTRs (clickthrough rates) and, ultimately, sales.

Above all, think of content marketing as a work in progress. Just as you would advise a client to revisit—and, when appropriate, modify—a financial plan as conditions change, a content marketing strategy should be continuously reviewed, evaluated and adjusted. Learn what works at each stage of the sales funnel—and don't hesitate to scrap what doesn't.

Contact us to learn how we can take your financial marketing strategies and activities to the next level.

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