From Conversation to Content:

AI-Powered Client Engagement for Modern Advisors

Speaker Overviews

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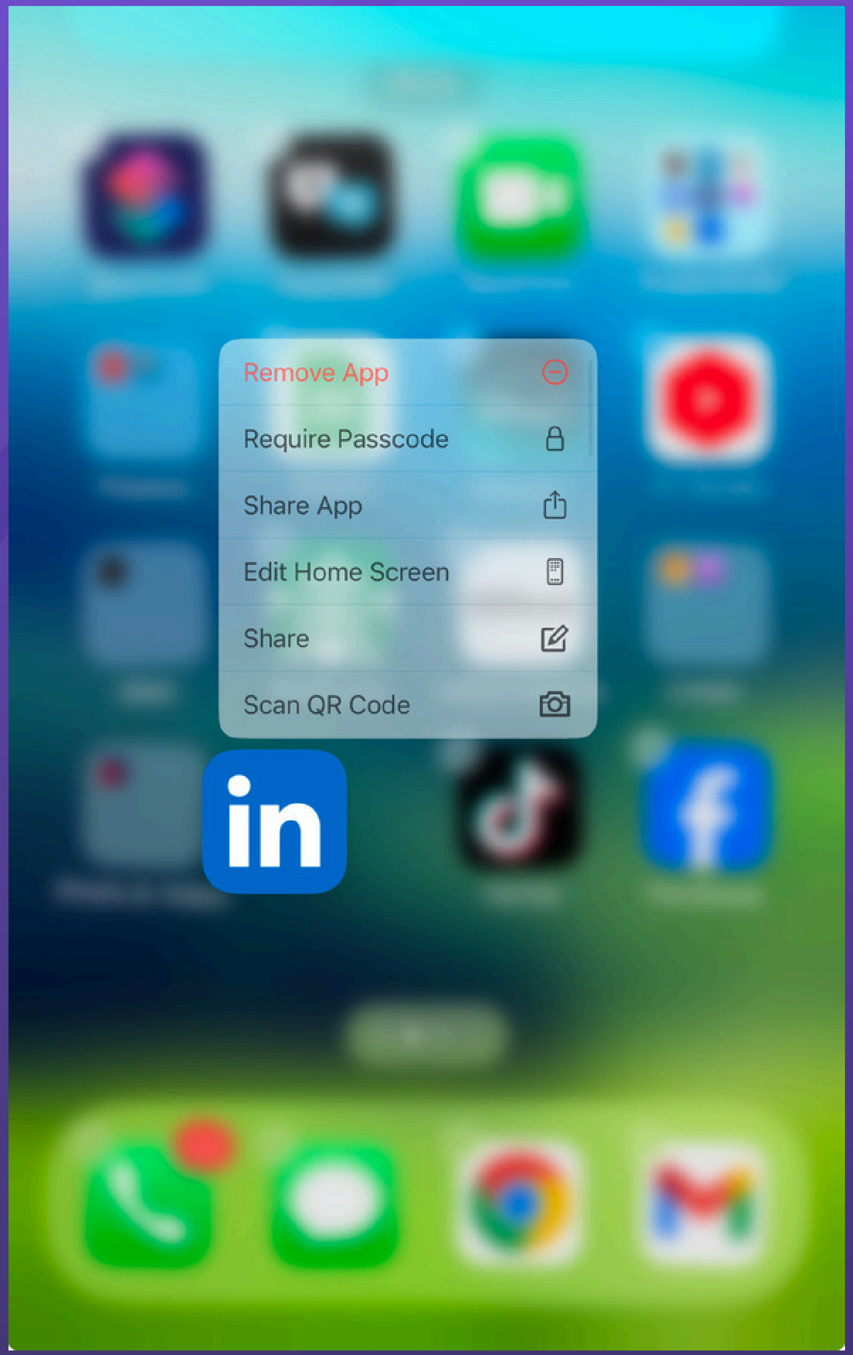
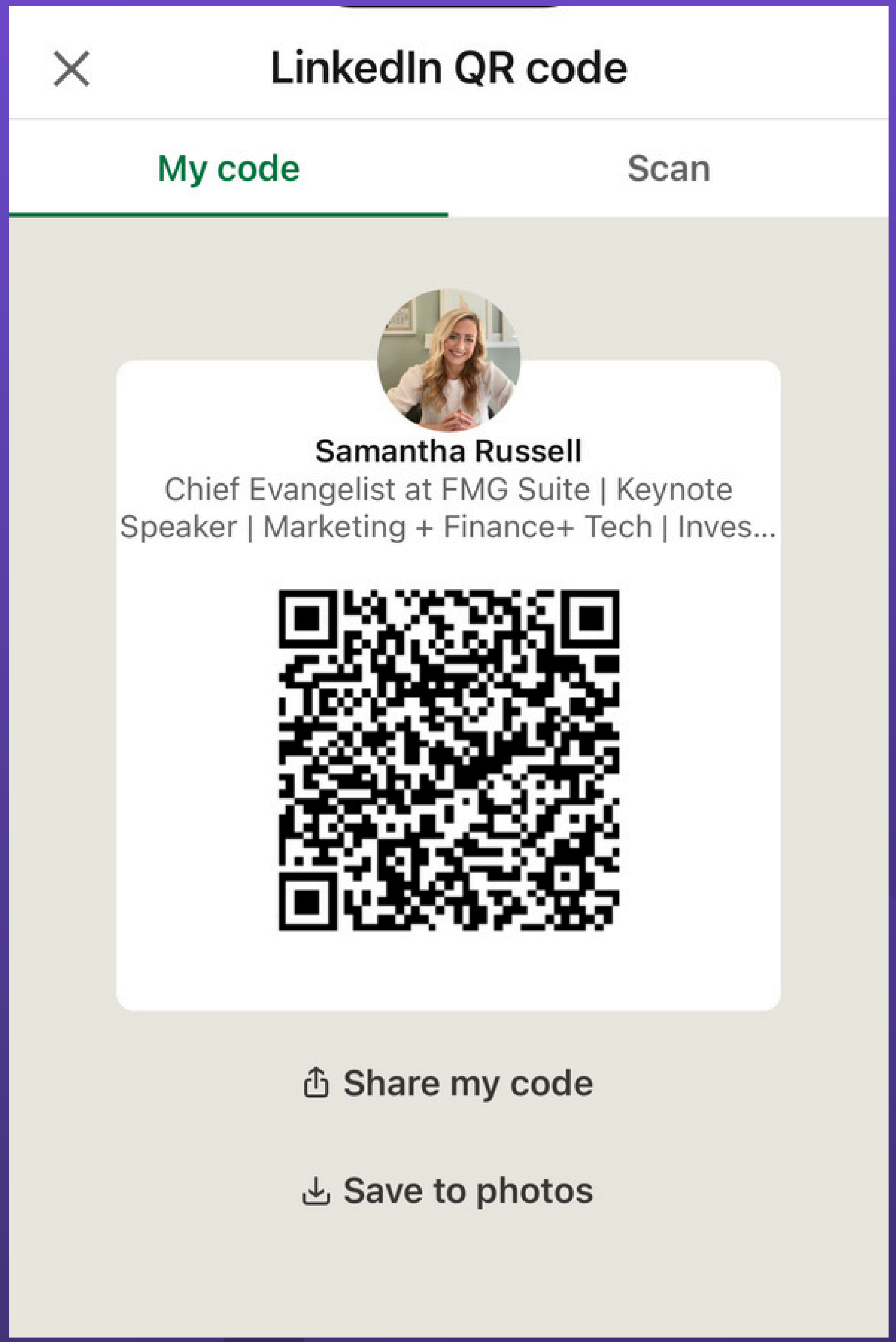
Let’s Connect on LinkedIn!

(Plus a Tip for all of You!)





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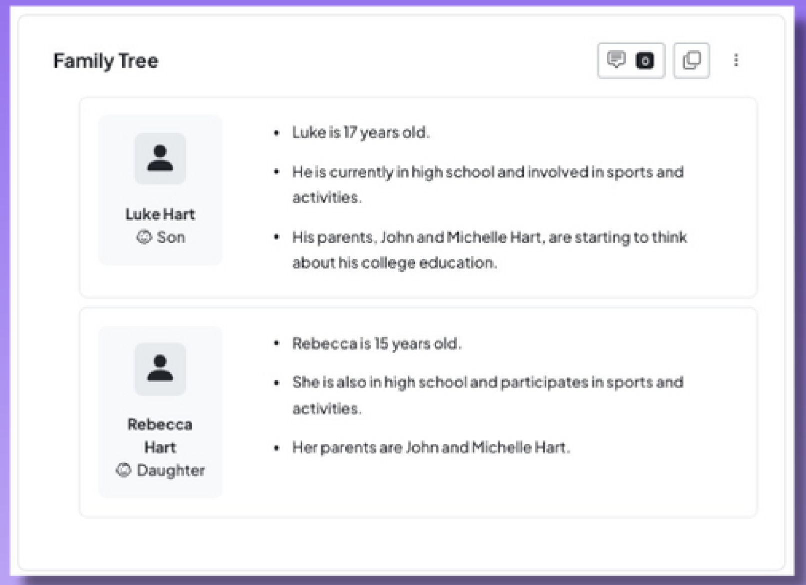
Deep Client Segmentation for Targeted Content

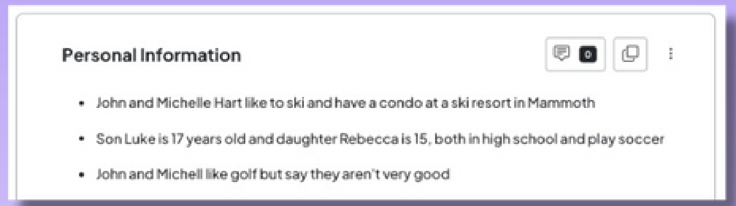
Understanding Client Personas

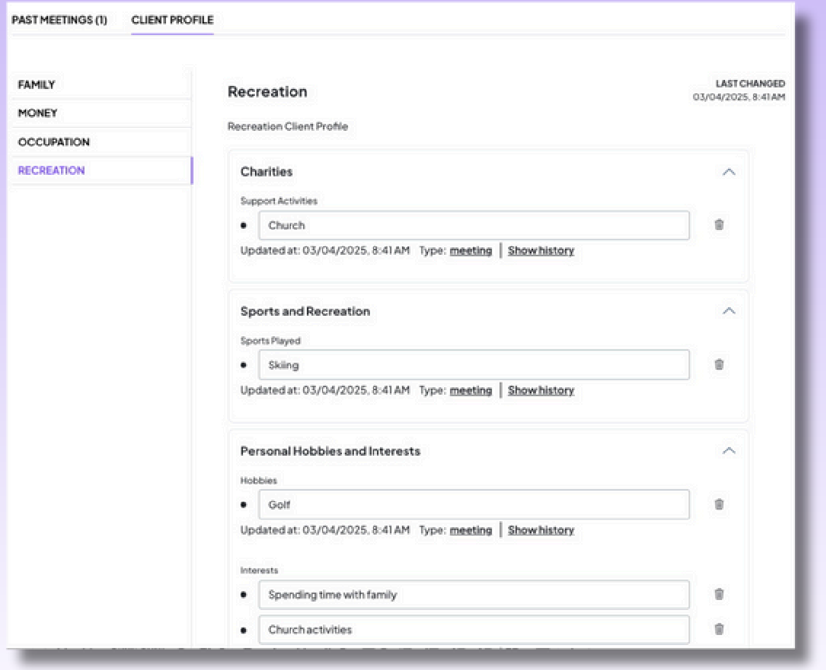
- Analyze client data and generate comprehensive profiles
- Identify key demographics, behaviors, and preferences to create tailored content

Enhanced Communication Strategies

- Leverage segmented insights to craft personalized messaging
- Foster stronger relationships through bespoke content that resonates with unique interests and needs







Responding to Market Volatility Situations

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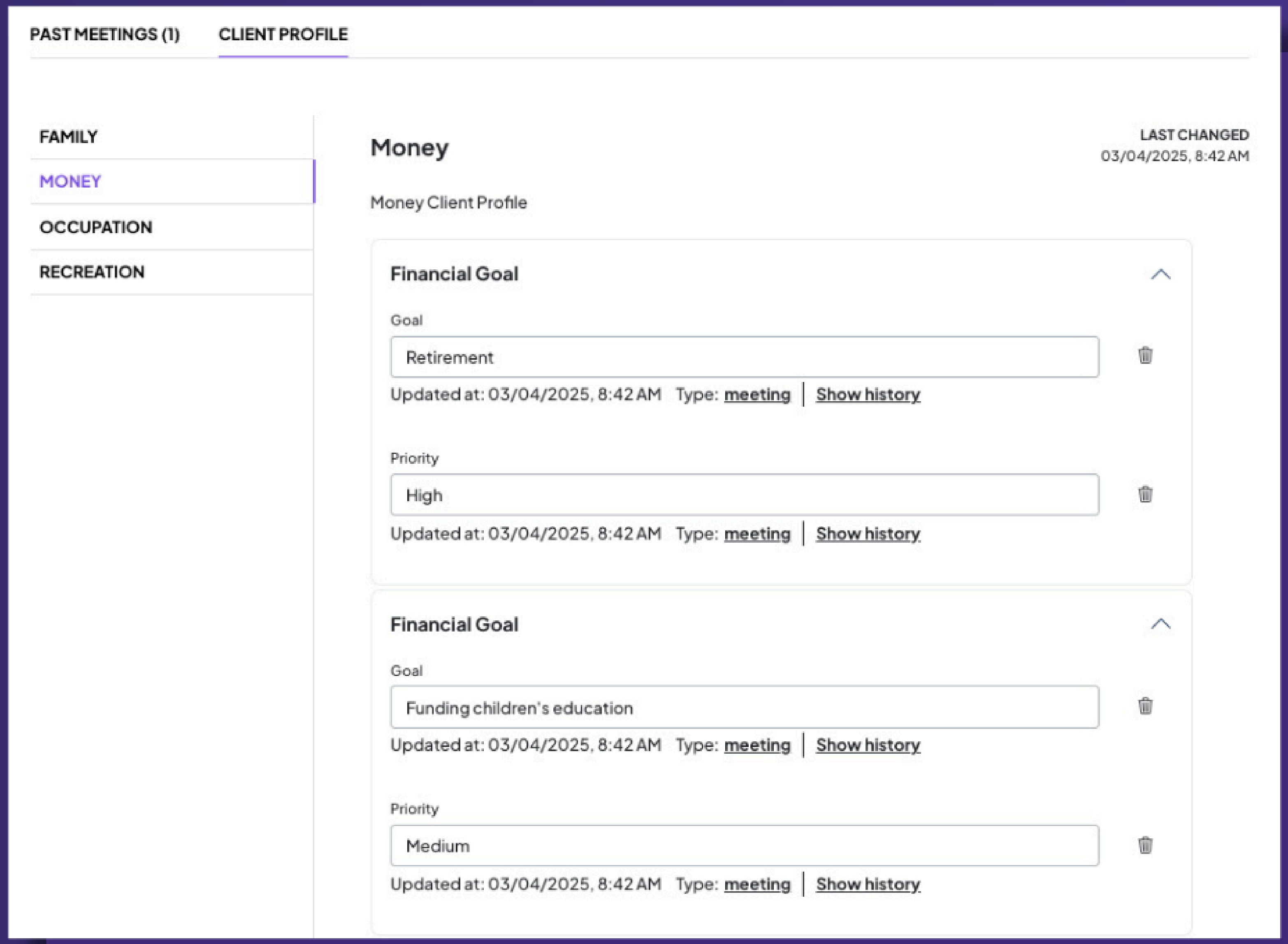
Content Creation in Real-Time

- Leverage AI to produce educational materials or insights that directly address current market conditions
- Content types: newsletters, blog posts, video updates, and social media posts

Best Practices

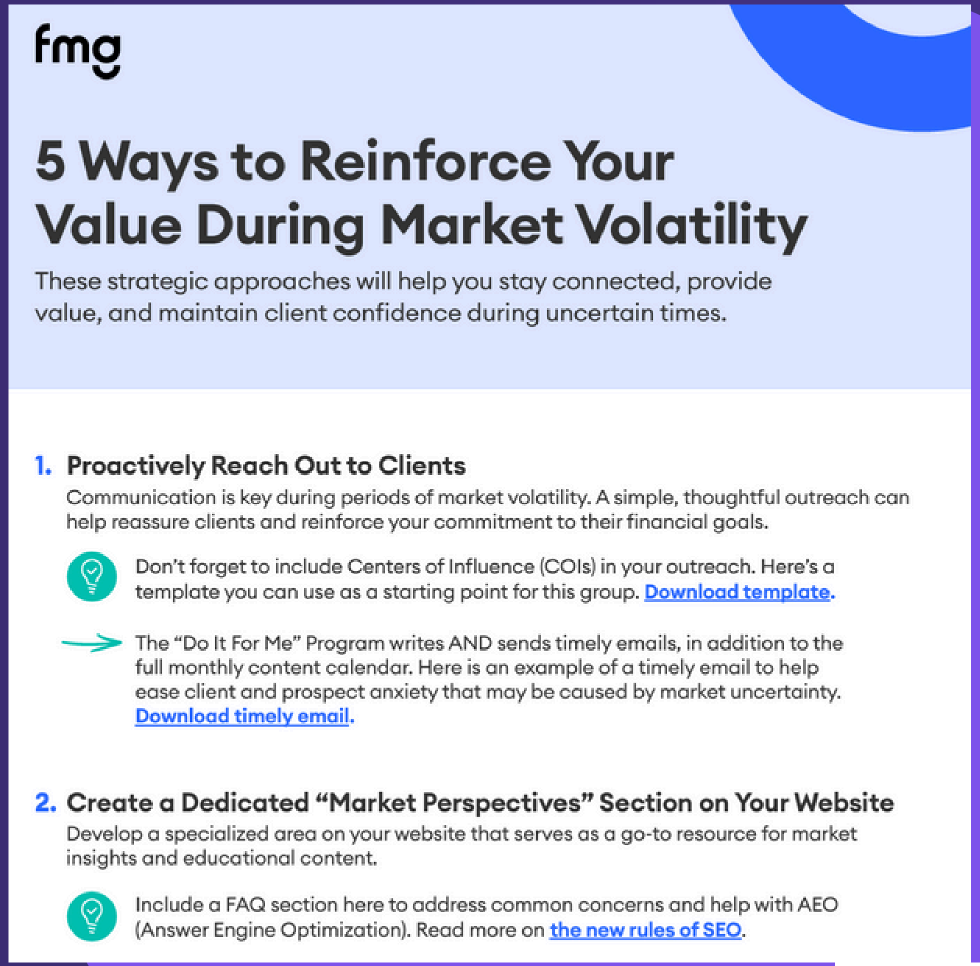
- Outline strategies for maintaining client trust during turbulent times by delivering prompt, well-informed content
- Frame discussions around risk management and portfolio recovery strategies



Market Volatility Communication

Best Practices

1. Proactively Reach out to Clients
2. Create a dedicated “Market Updates” section on your website
3. Host Market Update Webinar
4. Make Videos for social
5. Offer Family Financial Strategy Sessions



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5 Ways to Reinforce Your Value During Market Volatility

These strategic approaches will help you stay connected, provide value, and maintain client confidence during uncertain times.

1. Proactively Reach Out to Clients

Communication is key during periods of market volatility. A simple, thoughtful outreach can help reassure clients and reinforce your commitment to their financial goals.

Don't forget to include Centers of Influence (COIs) in your outreach. Here's a template you can use as a starting point for this group. Download template.

The “Do It For Me” Program writes AND sends timely emails, in addition to the full monthly content calendar. Here is an example of a timely email to help ease client and prospect anxiety that may be caused by market uncertainty. Download timely email.

2. Create a Dedicated “Market Perspectives” Section on Your Website

Develop a specialized area on your website that serves as a go-to resource for market insights and educational content.

Include a FAQ section here to address common concerns and help with AEO (Answer Engine Optimization). Read more on the new rules of SEO.

Get FMG’s Market Volatility Toolkit:
Scan the QR Code

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Enterprise-Level Benefits

(Training, Performance Insights)

Comprehensive Training

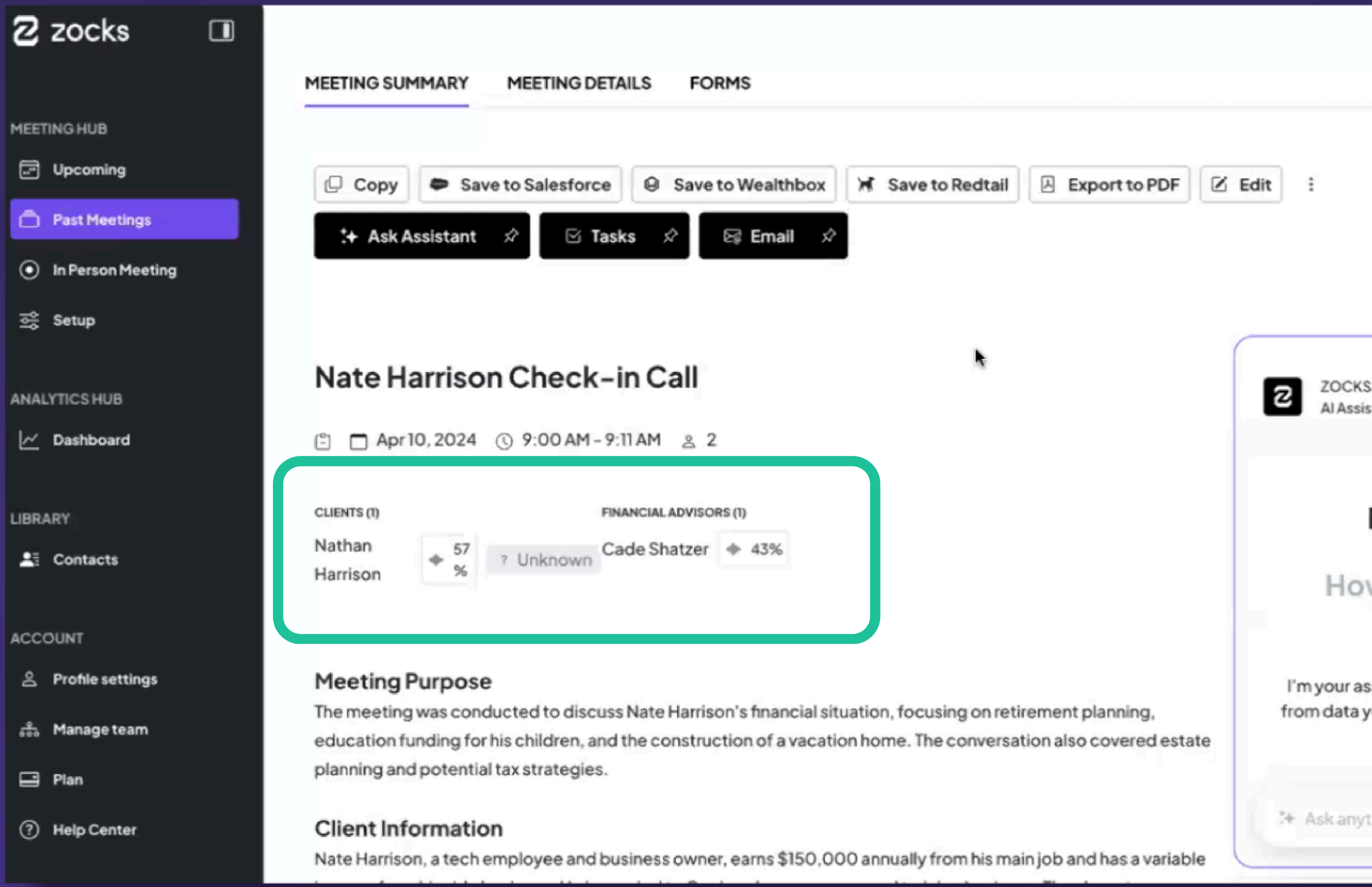
- Identify knowledge gaps and create targeted training initiatives

Performance Insights

- Track metrics like talk time to evaluate performance
- Use analytics to inform coaching conversations and drive strategy

Scalability and Efficiency

- Enhance overall operational efficiency, enabling advisors to focus more on client relationships and less on administrative tasks



FMG Marketing Guide

All of Samantha's Best (Actionable!) Marketing Tips Across Five Crucial Pillars:

1. Social Media
2. Website
3. Email & Text Communications
4. Events
5. Video

Questions?
Contact srussell@fmgsuite.com

Thank You!

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