



*“People are looking for a connection. Tell a good enough story about your brand and people will not only be invested, they’ll want to buy it from you.”*

– John Michael Morgan

We often tell our clients mutual funds are “sold and not bought.” We see evidence of this every day and are firm believers activity is a key driver for sales and distribution. However, activity is not the sole driver, marketing content plays a supporting and often a leading role in the sales process. Brand loyalty is created through multiple interactions with your audience on your product and service. The key is to always meet or exceed expectations with every client encounter. The goal is to create consistent marketing that touches on an emotional level and creates a connection.

 How do you create consistent brand experiences throughout a client’s buying cycle?

## MESSAGING

Devise a positioning statement that highlights your organization’s defining service or product characteristics. Craft a message, story that communicates personality, values and experiences in your market and connects with your target market.

## CONNECT AND DELIVER

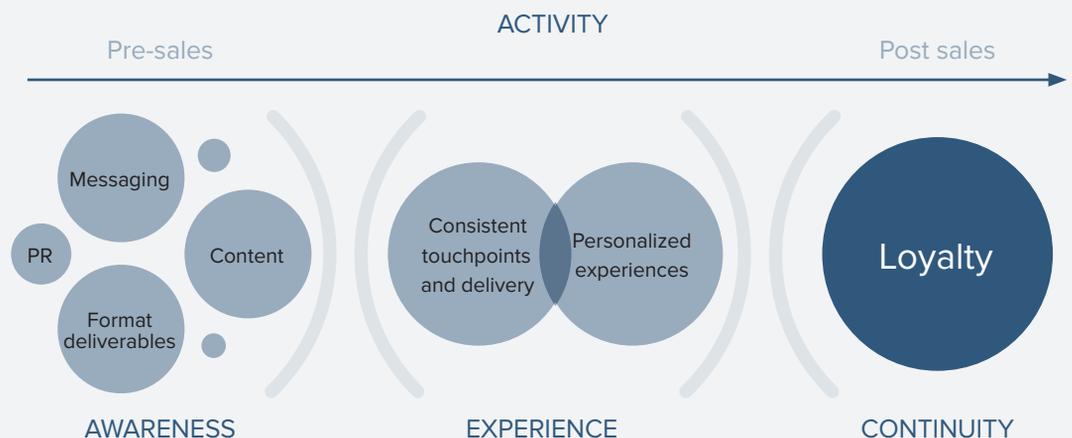
Consistency is key and delivering the same message and performance is reassuring to your target market. Brand consistency reaffirms your values as a company and gains customer trust and credibility. Consistency provides a clear distinction between you and the competitors.

## PERSONALIZED EXPERIENCE

Focus on building custom relationships as not all clients are the same. Of all the types of marketing touches, the personal touch is the most important. Understanding what’s important to them and how to make that connection is an art.

## MARKETING THROUGHOUT THE SALES CYCLE

Marketing content supports pre and post sales activity by creating brand awareness. This process may help develop a personal experience in order to create long lasting loyal relationships. Throughout the sales cycle, marketing can morph through several different stages. It creates awareness and excitement that can help you connect with an audience. Marketing can also educate and deliver consistent content which will remind the client of your core offerings.



 Creating a memorable brand begins with your distinct Competitive Edge. What makes you different than your competitors? Why should a client choose and stay with you?

## STORYTELLING

Storytelling allows you to convey memorable information. Forming impressions and relating to a listener allows them to associate themselves within a product story and you. Tie in facts to paint a picture that can be easily retained and may bring an emotional reaction to your listener. Developing an emotional connection requires a little research on your end. Conduct research on your prospect and tailor your story. Draft your stories and practice your story, if relevant, repeat them to different audiences.

## CONTENT MATTERS

Marketing communication can be extensive or simple, no matter the form, having your message available in multiple mediums may make the difference. Consider creating the following collateral materials:

- Print items – brochures, flyers, postcards
- Product white papers to compliment fact sheets and provide depth to the process
- Positioning flyer – highlighting the potential benefit of the strategy and process
- Sales presentations – demonstrating the process with proof point examples
- Web content – user friendly web navigation

*Compliment the collateral with action plans for distributing and following up on the materials.*

## STORYTELLING FUNDAMENTALS:

- 1 Memorable
- 2 Work facts into the story
- 3 Tailor to audience
- 4 Pre plan, draft the story
- 5 3-5 minutes max, practice

## DIGITAL FOOTPRINT

In a digital world, a web site may not be enough, but it's a start. What does your website say about you, is it just the facts or does it tell your story? The website may be a personal statement to bring in a client because it inspires confidence in your ability to execute on the clients behalf.

Things to consider:

- Choose colors that attract the eye
- When using pictures, what story does it tell?
- Be mindful of adding too many graphics
- Create an "About us" section that defines your culture and history
- Easy to navigate on portable devices

Additional footprints:

- Blog posts
- Quoted in industry articles or interviews
- Industry speaking or panel participation

*"Storytelling is the most powerful way to put ideas into the world today."*

– Robert McKee

## NEXT STEPS



**DISCOVER** – Live by your company's core principles to establish brand loyalty



**PLAN** – Define your company's Competitive Edge



**PREPARE** – Develop a marketing strategy



**ACT** – Create additional marketing opportunities in order to become well-known to your target market

Resources: <http://www.technicallymarketing.com/index.php/2013/03/21/6-steps-to-build-brand-loyalty-stay-top-of-mind-with-your-customers/>  
Competitive Positioning: Best Practices for Creating Brand Loyalty by Richard D. Czerniawski, Michael W. Maloney



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