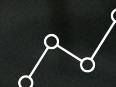




tractionhouse ►
WORLD-CLASS INVESTMENT MARKETING

AIMA Canada



MORE EXPOSURE.
MORE MEETINGS.
MORE ALLOCATIONS.

Presenters:



SIMON JALBERT
Co-Founder
Traction House

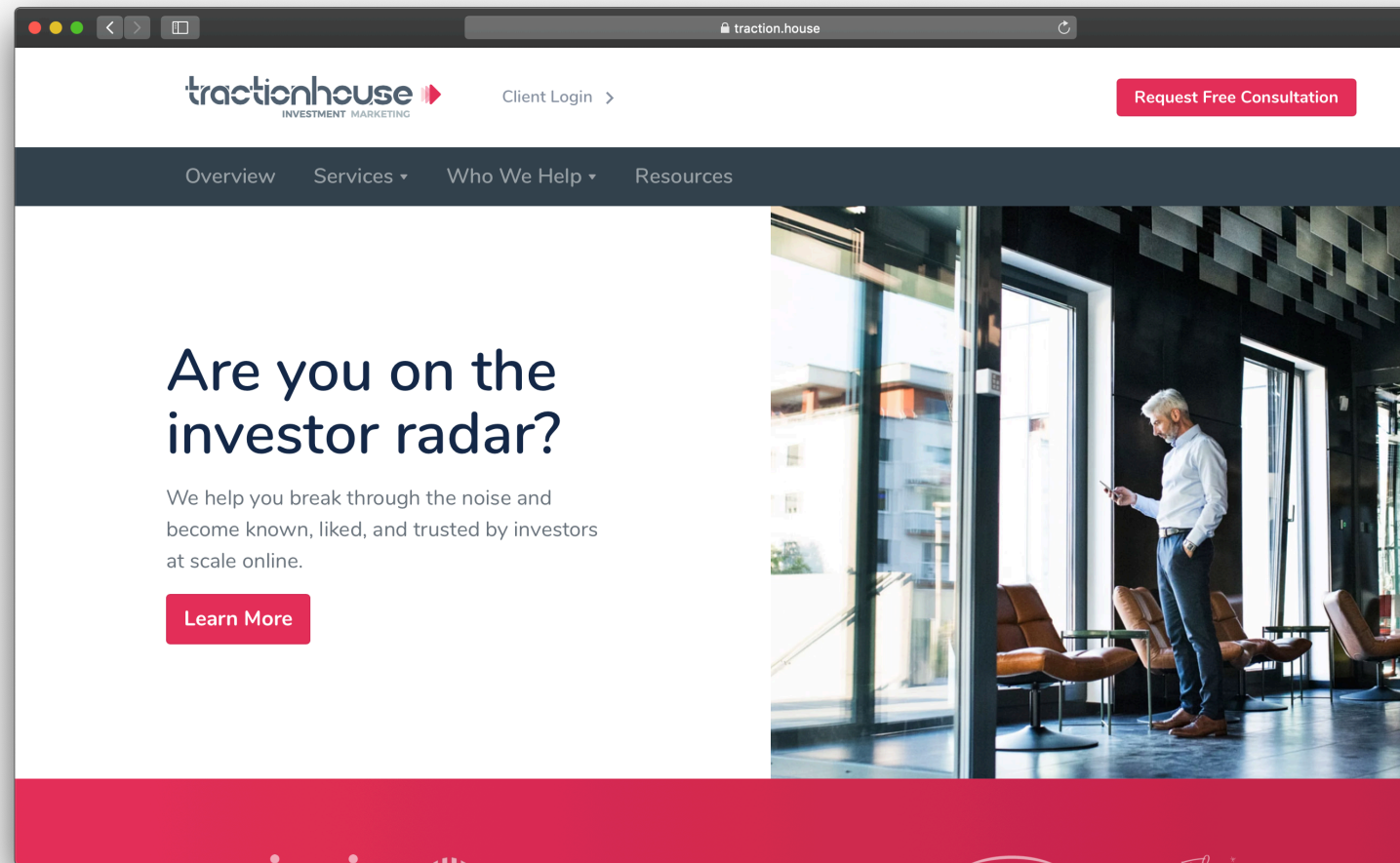


CHADD WESTON
Co-Founder
Traction House



We Help:

- ETFs/Mutual Funds
- VC/Real Estate/Private Equity
- Financial Advisors
- Exchanges



Agenda:

- Introductions
- Competing In The Attention Economy
- Financial Advisor (Toronto) Case Sample
 - **STORY**
 - Your Website Has One Job
 - Content Is The New King
 - **DISTRIBUTION**
 - 1,000 Sets Of Eyes For The Cost Of A Latte
 - Advanced Targeting Method
 - **SALES INTELLIGENCE**
 - Prioritizing Conversations
 - Are My Exposure Dollars Working?
- Resources + Q&A



True love is a lack of desire to check one's smart phone in another's presence.

Alain De Botton

Attention is the game in marketing.

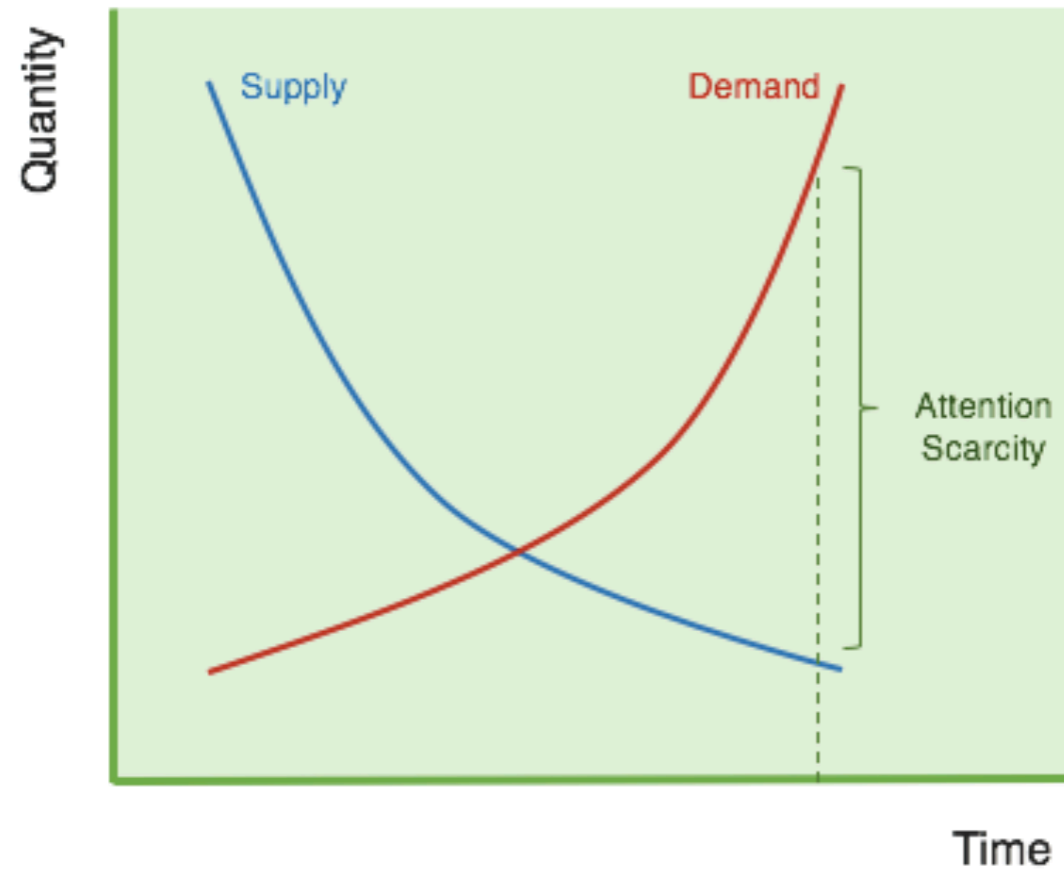
Attention has become a
scare commodity.

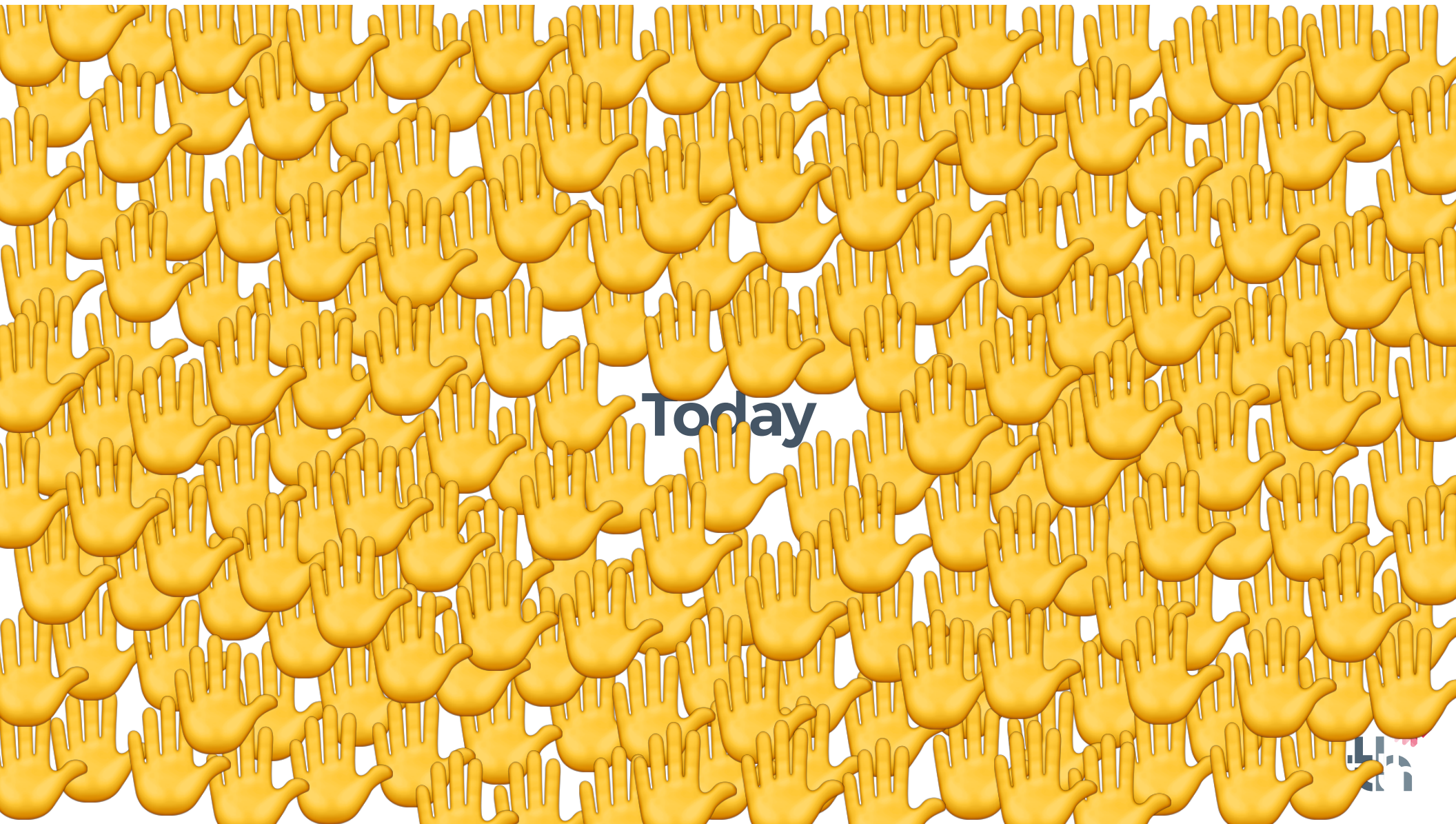


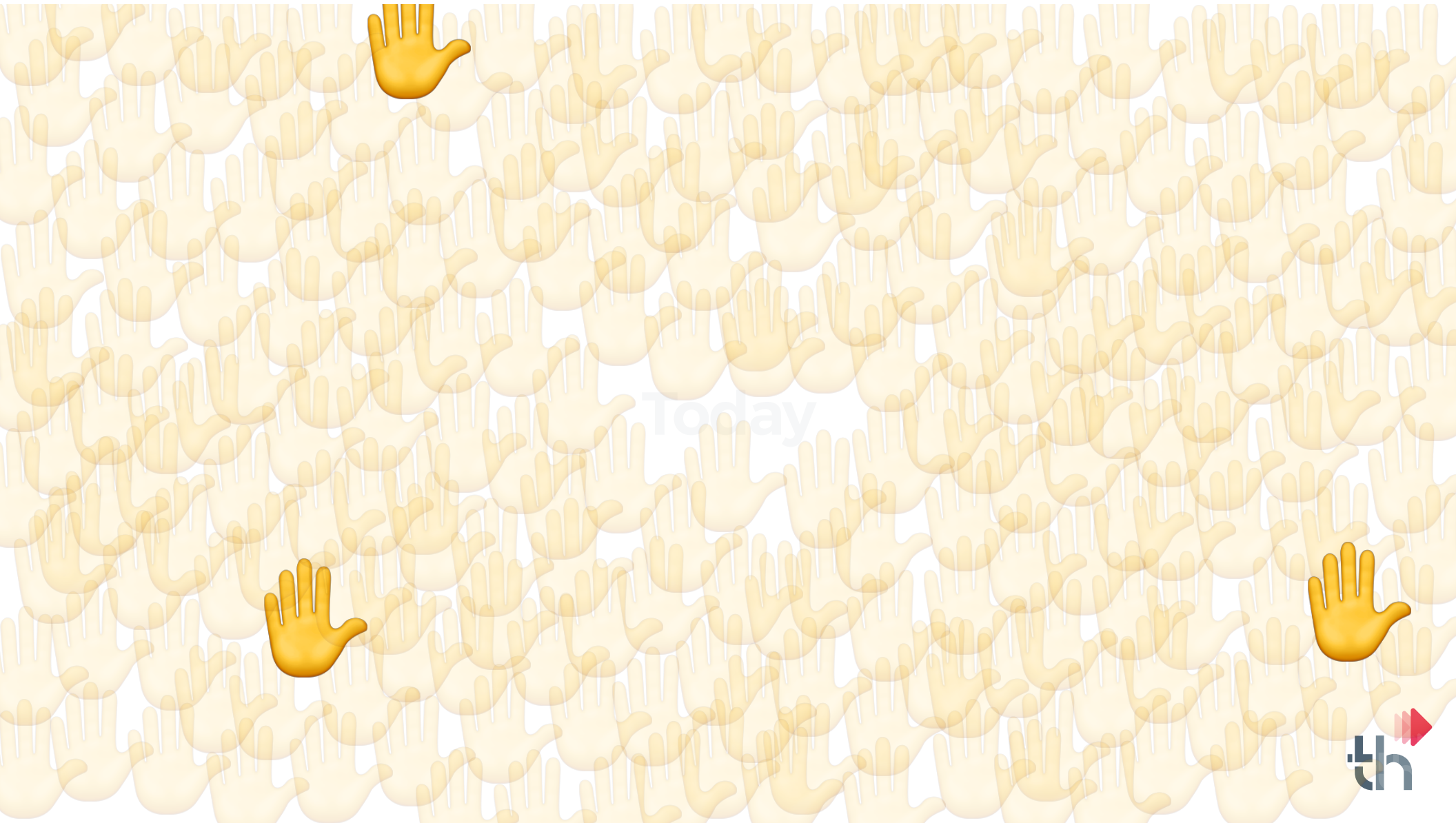
1970's











Today



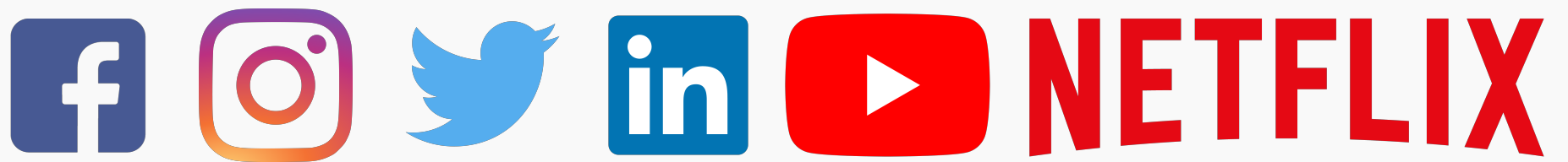


"At some point, we start a screening process for what we engage with and start ignoring brands and advertising messages, unless it's something that we have a **personal interest in.**"



Forbes







Keeping You In The Casino.





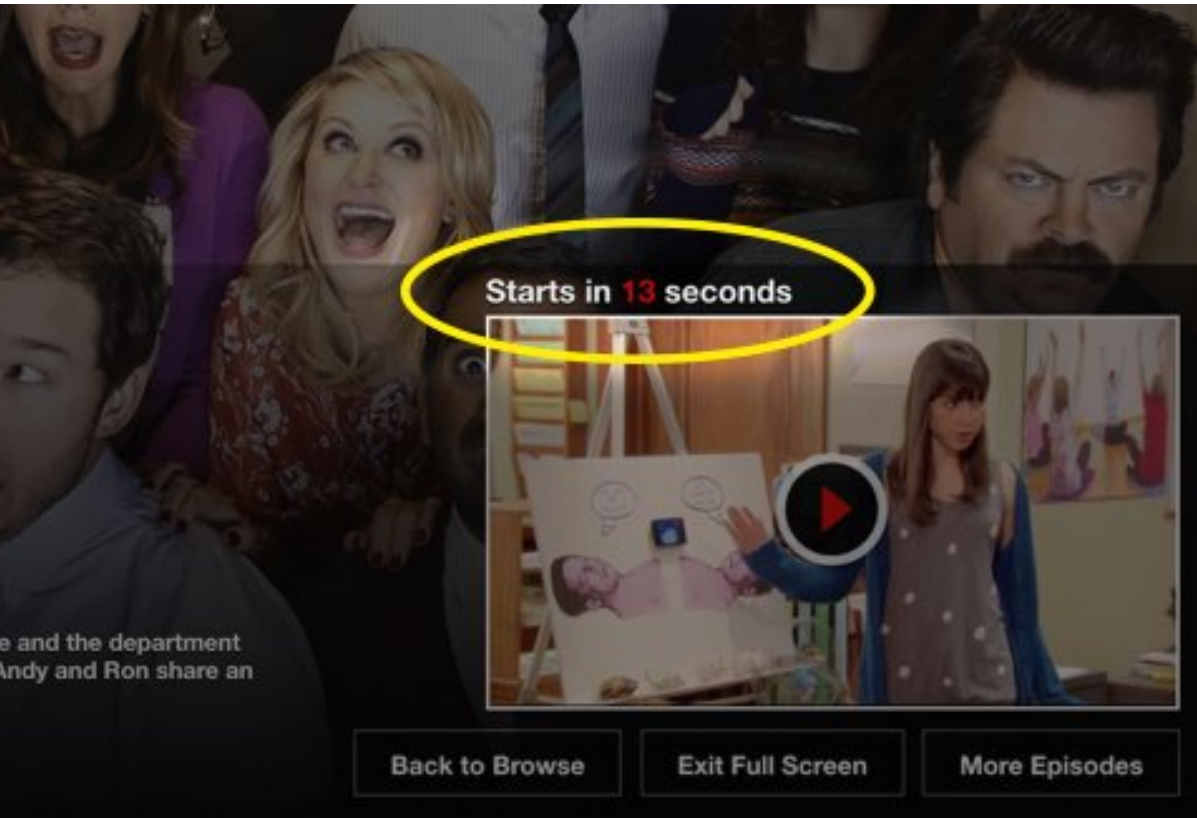
“At Netflix, we are competing for our customer’s time, so our competitors include Snapchat, Youtube, sleep etc.

Reed Hastings, Netflix CEO

NETFLIX



NETFLIX



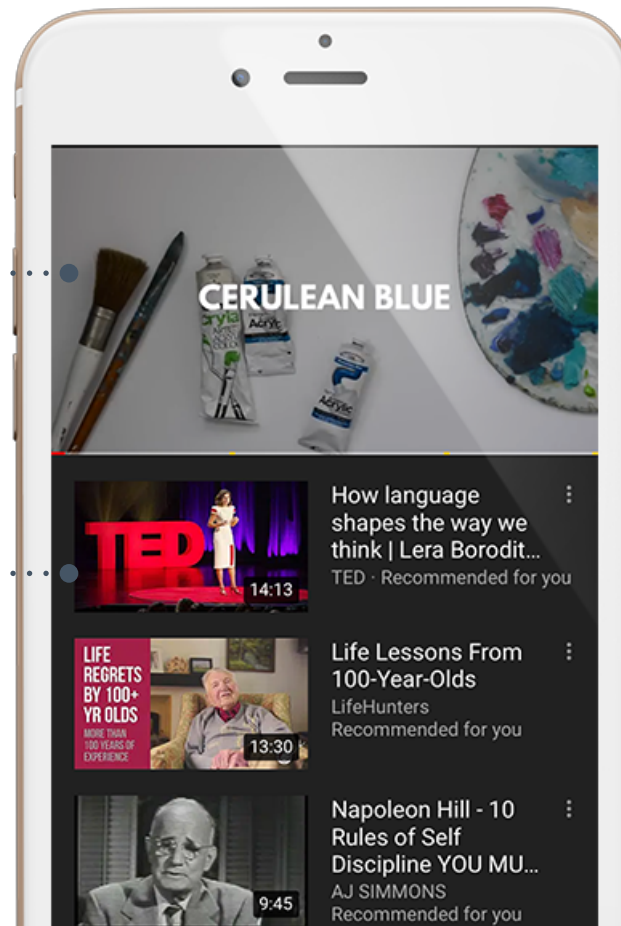
AUTOPLAY
next video





PAINTING VIDEO

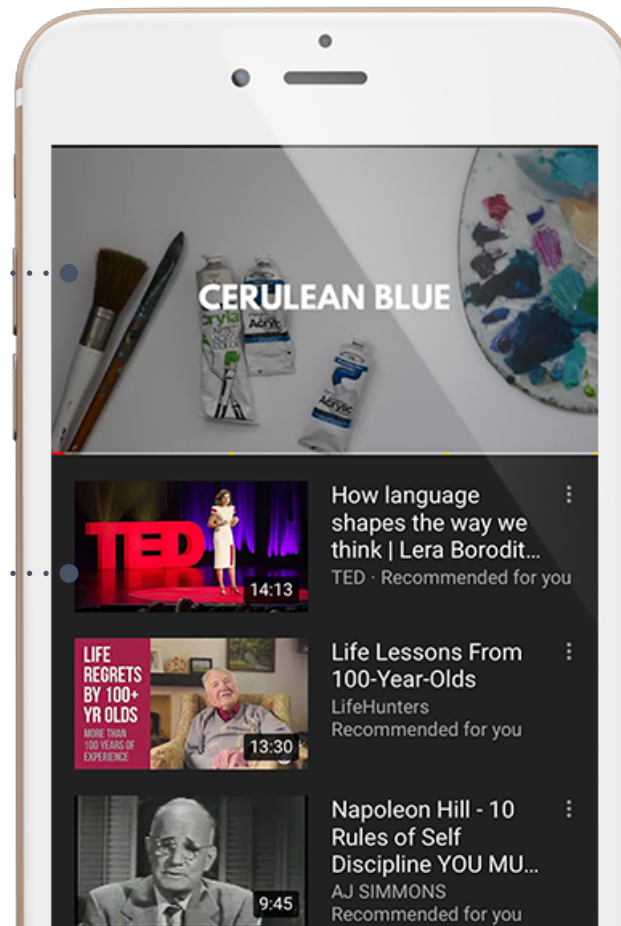
RECOMENDATIONS





PAINTING VIDEO

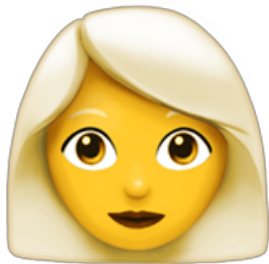
RECOMENDATIONS
(not related to painting)



"Behind every screen on your phone, there are generally like literally a thousand engineers that have worked on this thing to try to make it maximally addicting"

Aza Raskin

(Former Mozilla Employee and Designer of Infinite Scrolling)

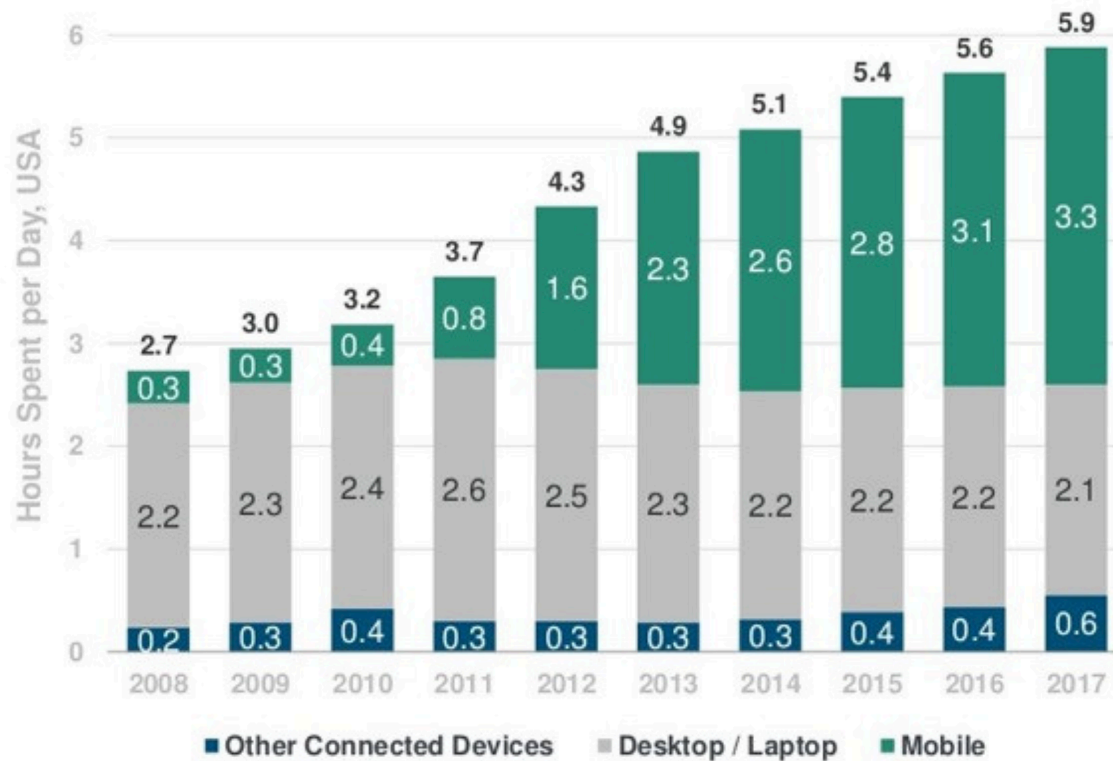


You

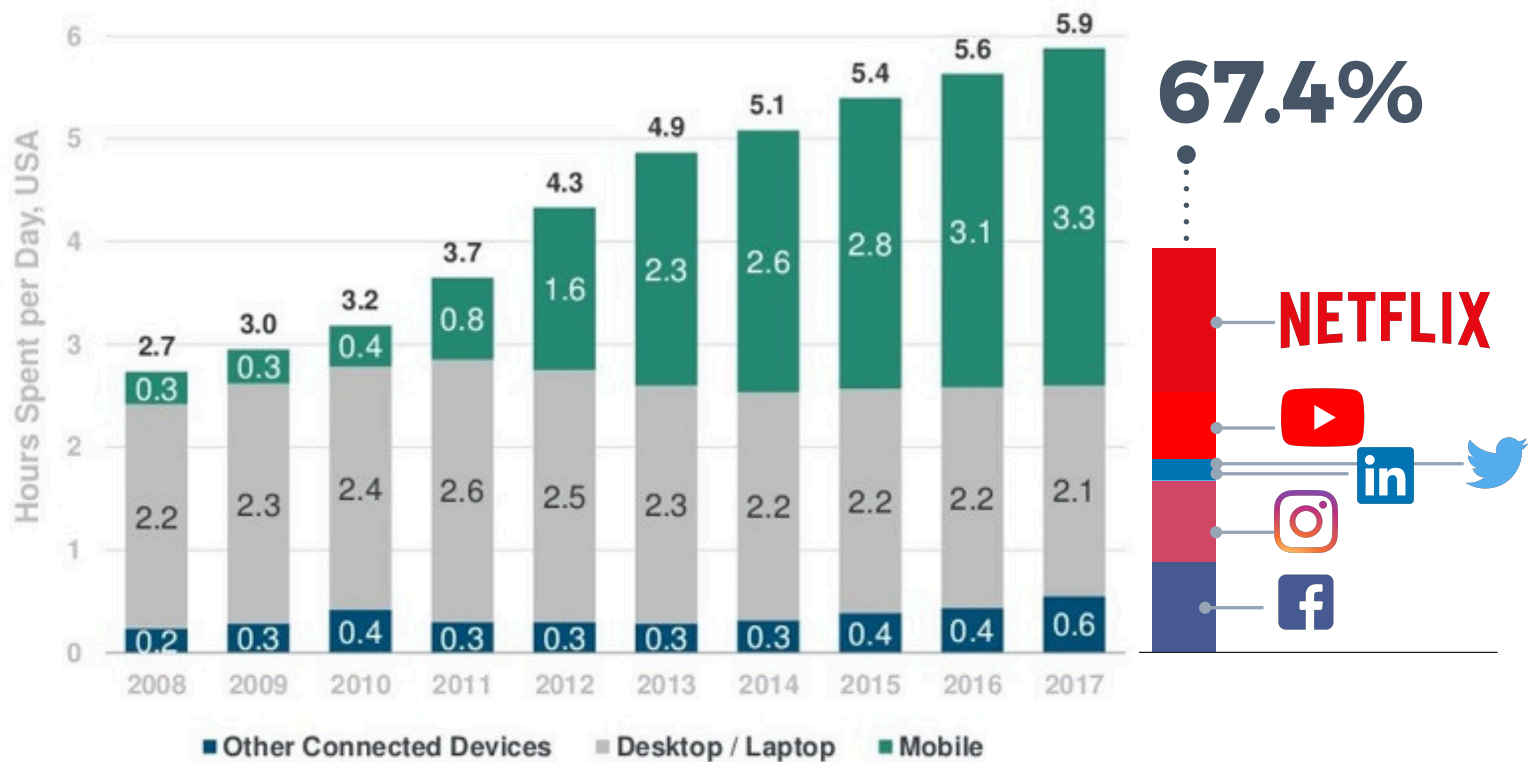




Daily Hours Spent with Digital Media per Adult User



Daily Hours Spent with Digital Media per Adult User





53 MIN
per day



48 MIN
per day



1 MIN
per day



12 MIN
per day



40 MIN
per day

NETFLIX



85 MIN
per day

“Today, organic reach for business on social is reported to be as low as 2%”

Nicholas L. Holland (VP Product, Hubspot)



“It’s not that quality content isn’t an effective magnet for prospective customers. It’s that companies like Facebook and Google are less likely to surface that content today without some budget behind it.”

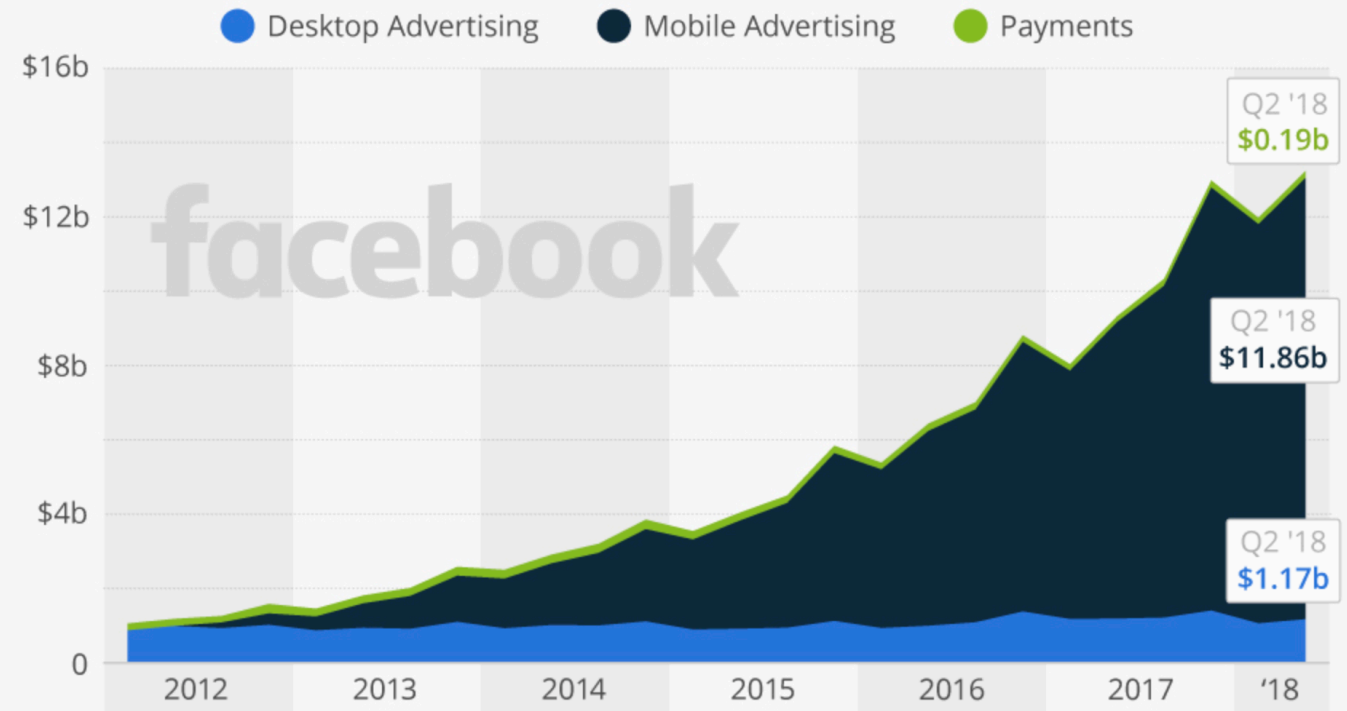
Meghan Keaney Anderson (VP Marketing, Hubspot)





Facebook's Growth Is Fueled by Mobile Ads

Facebook's quarterly revenue by segment



@StatistaCharts Source: Facebook

statista





ONE JOB DESCRIPTION:

**Pay for and
make use of
attention on
digital to drive
client ROI.**



Use Case Sample: Financial Advisor (Toronto)



Takshil Ahire
Financial Advisor,
ABC Wealth Management

GOAL:

**Generate new conversations
with local investment prospects
on a regular basis**

How would Chadd and I leverage digital to drive new conversations for Takshil?

- 1. Story**
- 2. Distribution**
- 3. Sales Intelligence**

1. **Story**
2. Distribution
3. Sales Intelligence

1. **Story**
2. Distribution
3. Sales Intelligence

How do we persuade an ideal prospect that Takshil Ahire is worth a phone call?

1. **Story**
2. Distribution
3. Sales Intelligence

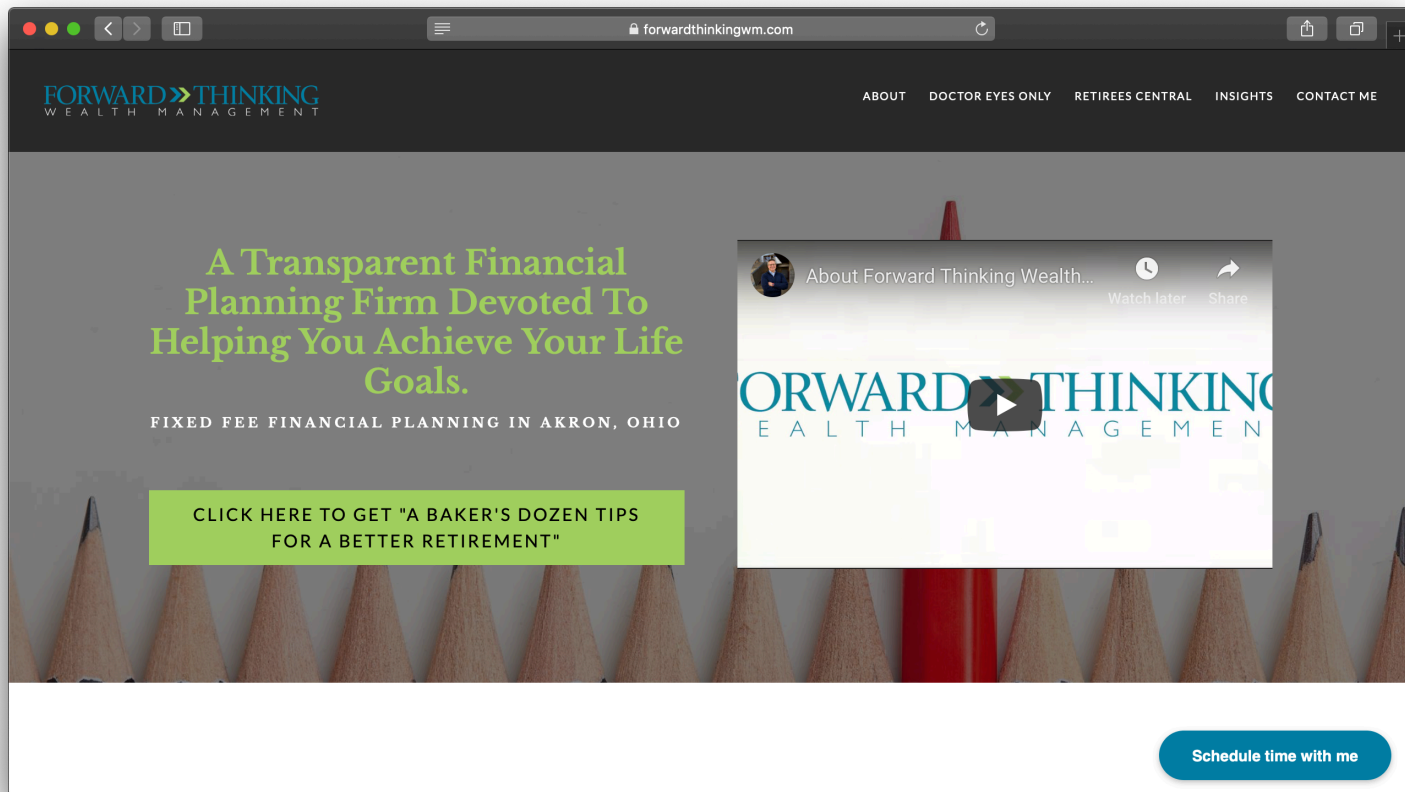
**YOUR WEBSITE HAS ONE GOAL:
CONVERT LEADS**



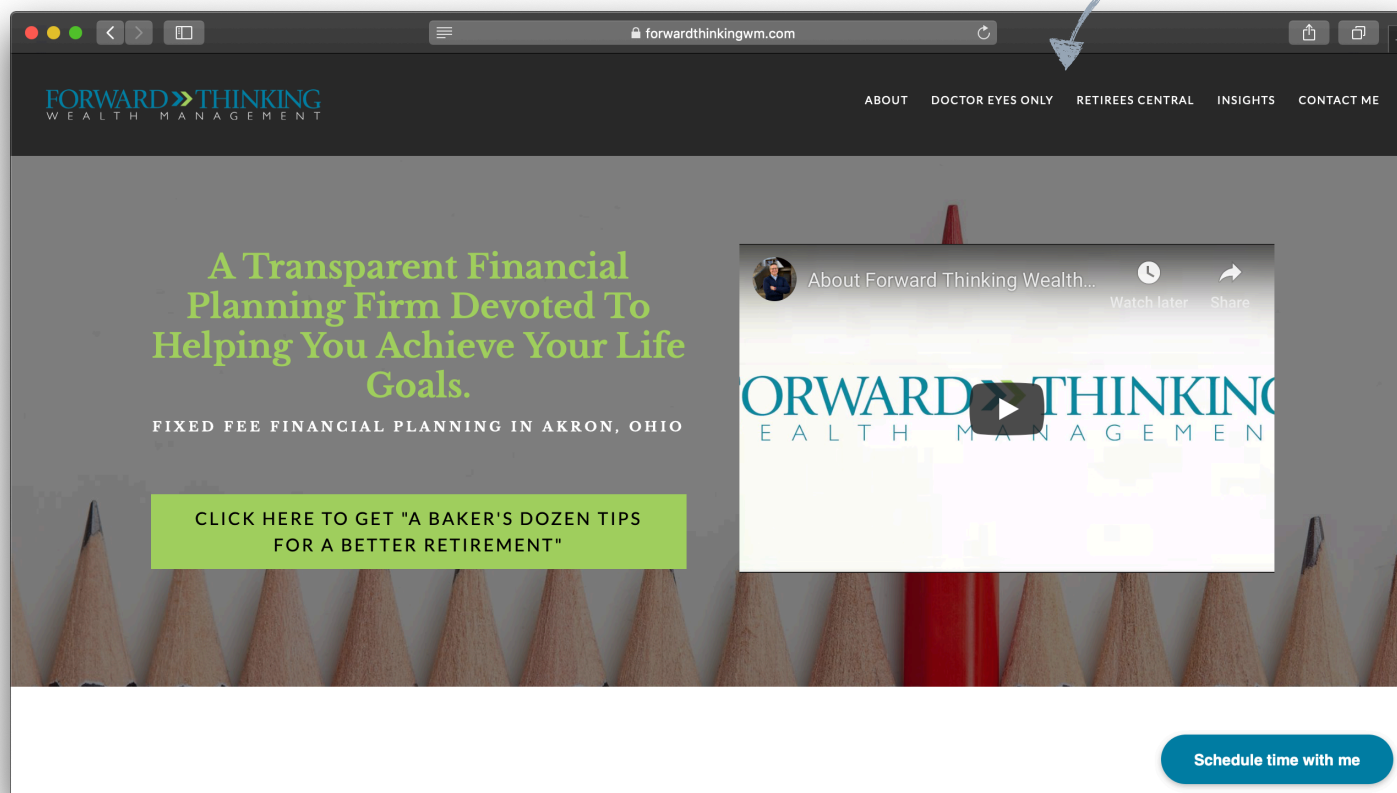
1. **Story**
2. Distribution
3. Sales Intelligence

If your website is *converting leads*, its an indication that:

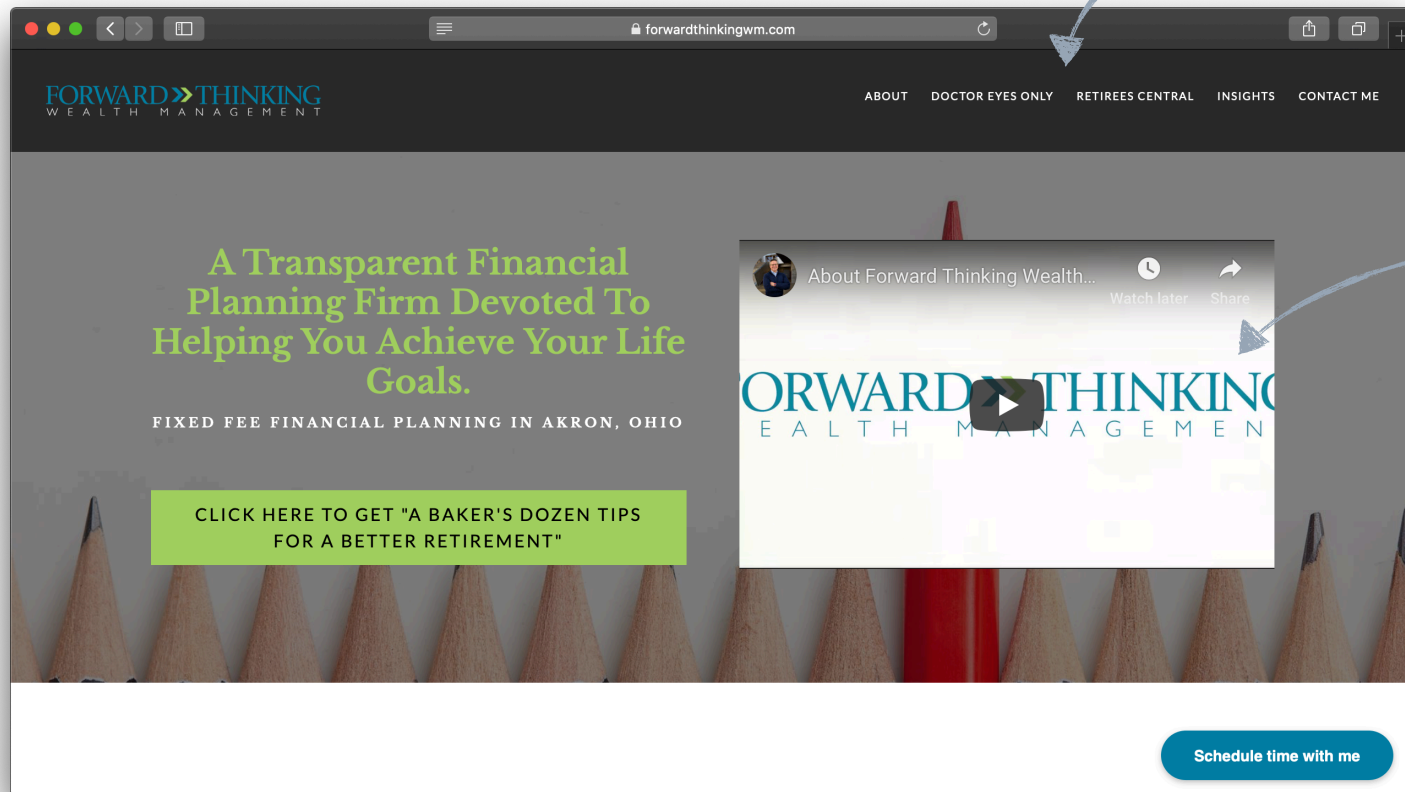
- The design is clean and mobile friendly
- You have a clear differentiator
- Easy, accessible call-to-action (CTA)
- A story that compels people to *engage with you offline*



OWNING NICHES:
(Doctors & Retirement)



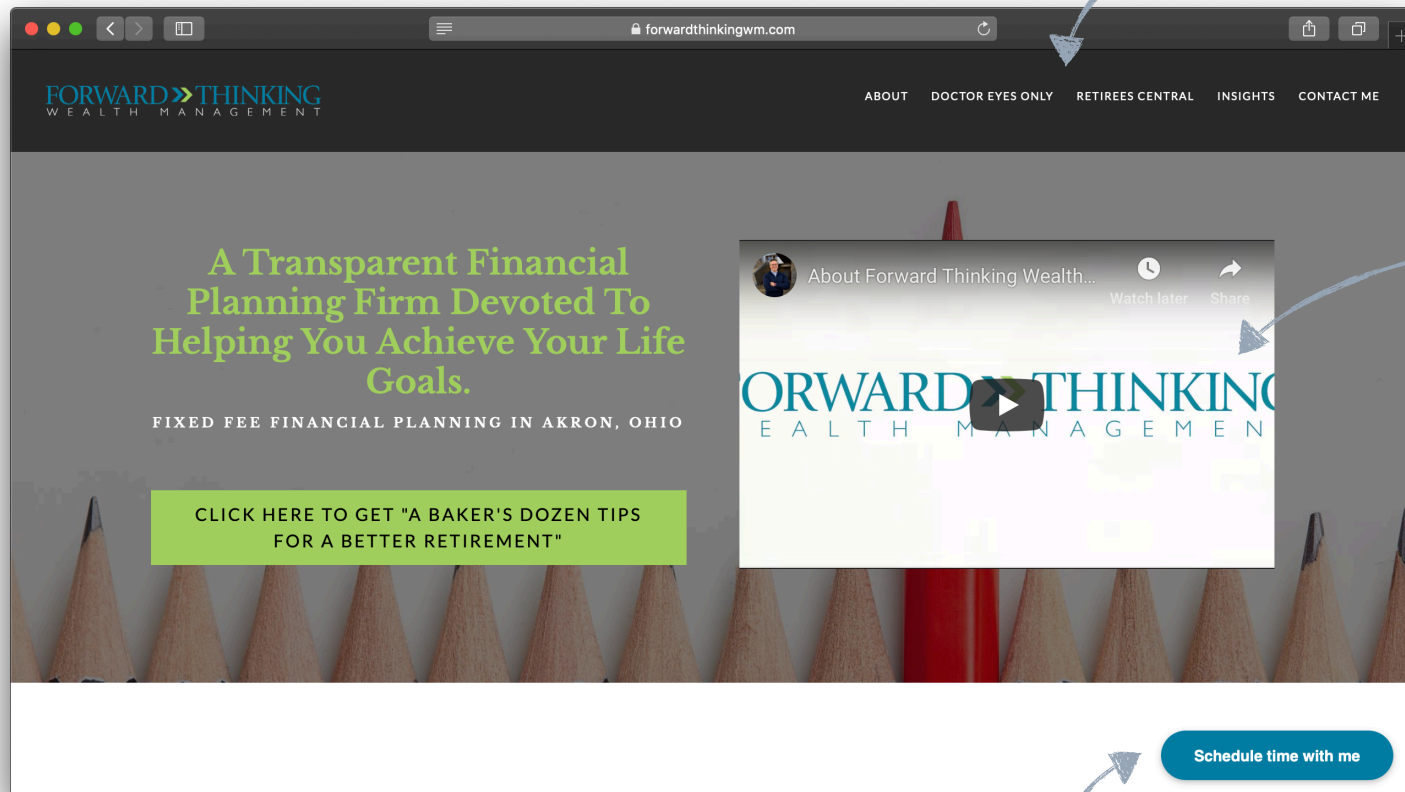
OWNING NICHES:
(Doctors & Retirement)



**ENGAGING
CONTENT**
Explainer
Video



OWNING NICHE:
(Doctors & Retirement)

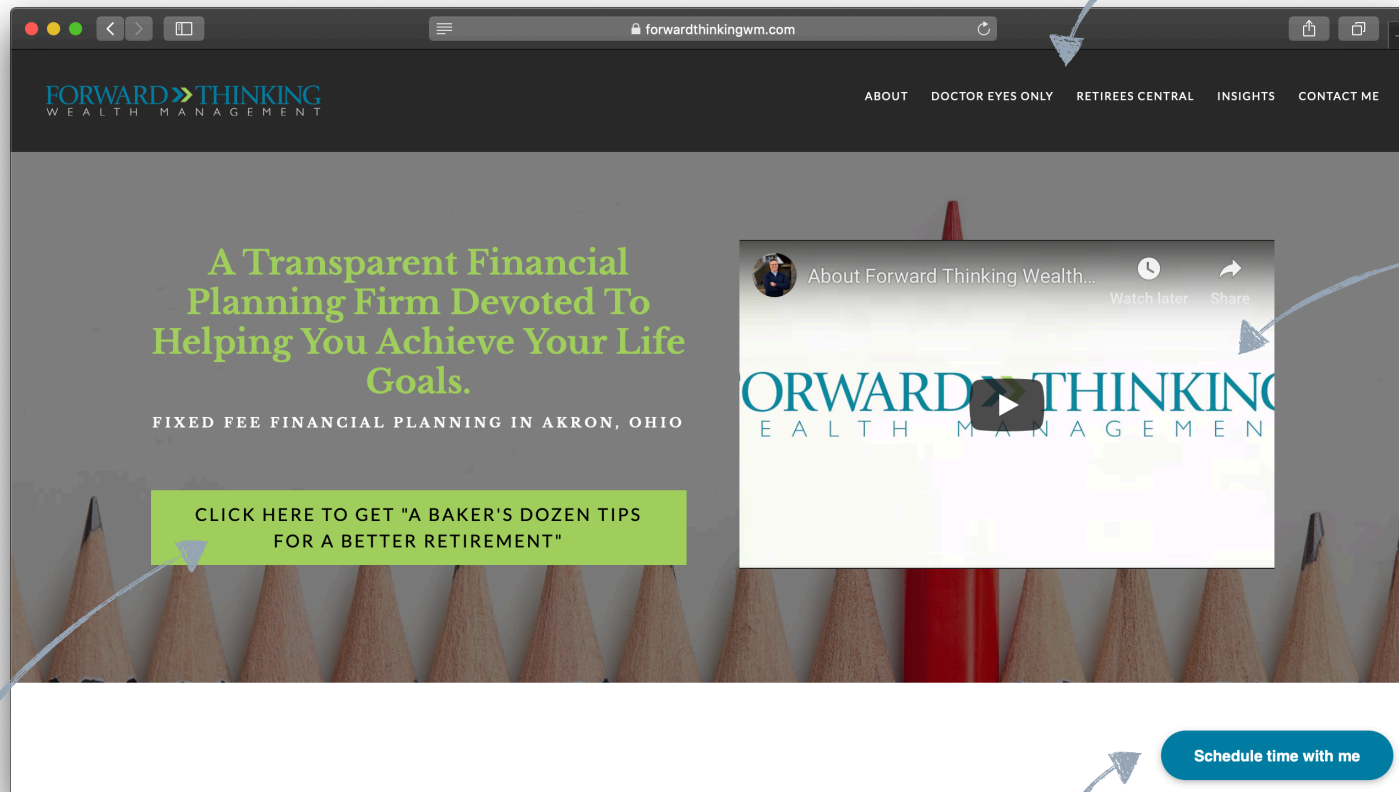


ENGAGING CONTENT
Explainer Video

ACCESSIBLE
No-Friction Scheduling



OWNING NICHES:
(Doctors & Retirement)



ENGAGING CONTENT
Explainer Video

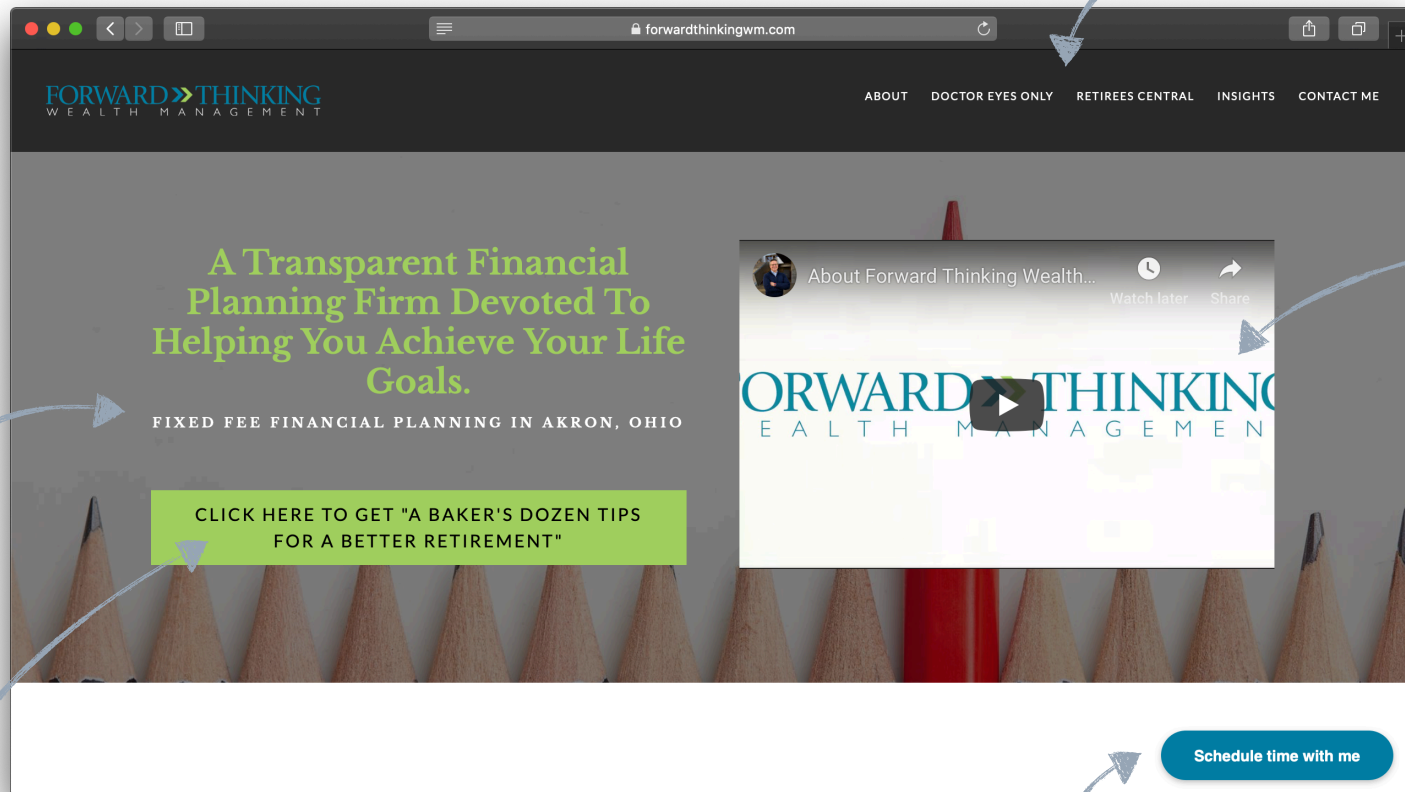
CLEAR CALL-TO-ACTION
(VALUE OFFER)

ACCESSIBLE
No-Friction Scheduling



OWNING NICHES:
(Doctors & Retirement)

**ENGAGING
CONTENT**
Explainer
Video



DIFFERENTIATOR
(FIXED FEE
ALIGNMENT)

**CLEAR CALL-TO-
ACTION**
(VALUE OFFER)

ACCESSIBLE
No-Friction Scheduling



1. Distribution
2. **Story**
3. Sales Intelligence

Customer Jobs Theory (JTBD)

A Job to be Done is the process a consumer goes through whenever she aims to transform her existing life-situation into a preferred one, but cannot because there are constraints that stop her.

1. Distribution
2. **Story**
3. Sales Intelligence

Here's A Content Challenge:



1. Distribution
2. **Story**
3. Sales Intelligence

Here's A Content Challenge:

Can you produce enough content on a particular subject, that a prospect could feasibly achieve their JTBD *without ever calling you? Or hiring an advisor at all?*

1. Distribution
2. **Story**
3. Sales Intelligence

Here's A Content Challenge:

Can you produce enough content on a particular subject, that a prospect could feasibly achieve their JTBD *without ever calling you? Or hiring an advisor at all?*

Share away. People Will Hire You Anyways.



1. Distribution
2. **Story**
3. Sales Intelligence

What do I talk about?

- Investment Strategies
- Banking & Credit Management
- Retirement Planning
- Protecting Your Assets
- Tax Management
- Passing On Your Wealth
- Education Funding
- Business Succession Planning
- Planning For Major Purchases
- Charitable Giving

1. Distribution
2. **Story**
3. Sales Intelligence

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- Education Funding
- Business Succession Planning
- Planning For Major Purchases
- Charitable Giving

“Own your niche.”



1. Distribution
2. Story
3. Sales Intelligence



Consult your compliance team first

It's important to make sure your content is compliant to the regulations in your jurisdiction.

What do I talk about?

- Investment Strategies
- Banking & Credit Management
- Retirement Planning
- Protecting Your Assets
- Tax Management
- Passing On Your Wealth
- Education Funding
- Business Succession Planning
- Planning For Major Purchases
- Charitable Giving

“Own your niche.”


1. Distribution
2. **Story**
3. Sales Intelligence

How do I “talk”?

- Blog articles
- Video Interviews
- Podcast (Yes, we mean it)
- PDF Checklist Downloads
- Case Study (PPTX Presentations)
- Sample Financial Plans
- Email Subscribers

1. Distribution
2. **Story**
3. Sales Intelligence

Advanced Tip 1: Video

- Video 
- Audio portion to Podcast
- Transcribed to blog post
- Quotes to tweet
- Key themes to PDF checklist

1. Distribution
2. **Story**
3. Sales Intelligence

Advanced Tip 2: MailChimp RSS Emails

MailChimp is one of the world's leading email marketing apps. They have a feature called **RSS-to-Email** that will “listen” anytime you post content to your website, and auto-send to your subscribers in a beautifully formatted email.



1. **Story**
2. Distribution
3. Sales Intelligence

1. Story
- 2. Distribution**
3. Sales Intelligence



\$5.93



\$5.93



Q4 MEDIAN

CPM

\$5.93

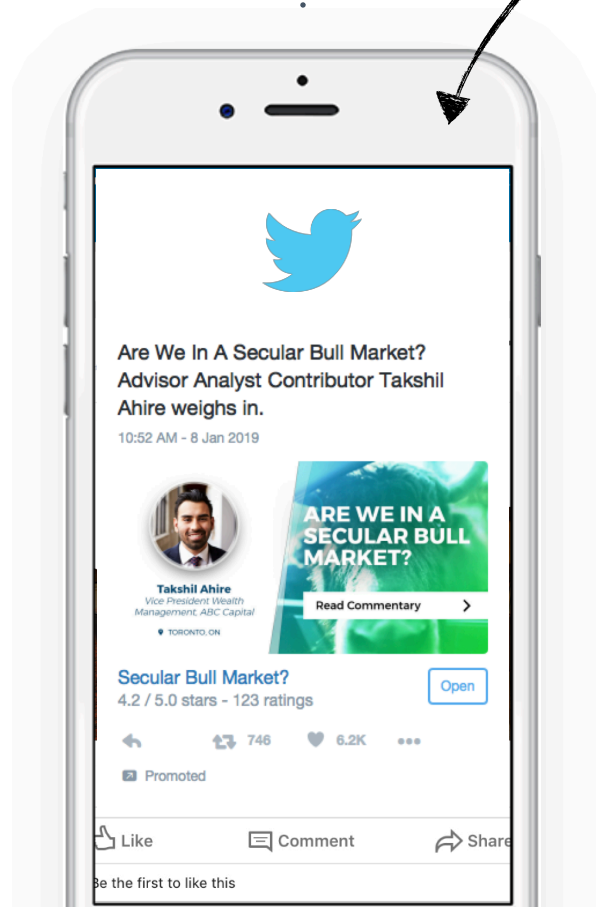


2018

\$5.93

CPM:

Cost per 1000 times Takshil's commentary shows on the Twitter news feeds of his ideal persons.



1. Story
2. **Distribution**
3. Sales Intelligence

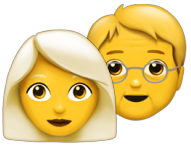
But...
who are Takshil's ideal persons?

1. Story
2. **Distribution**
3. Sales Intelligence

But...
who are Takshil's ideal persons?

And..
How do we get their attention?

1. Story
2. Distribution
3. Sales Intelligence



Ideal
Person

**30-65 yr old homeowners with
80k+ annual income residing in the
GTA who are likely to be
investment-minded.**

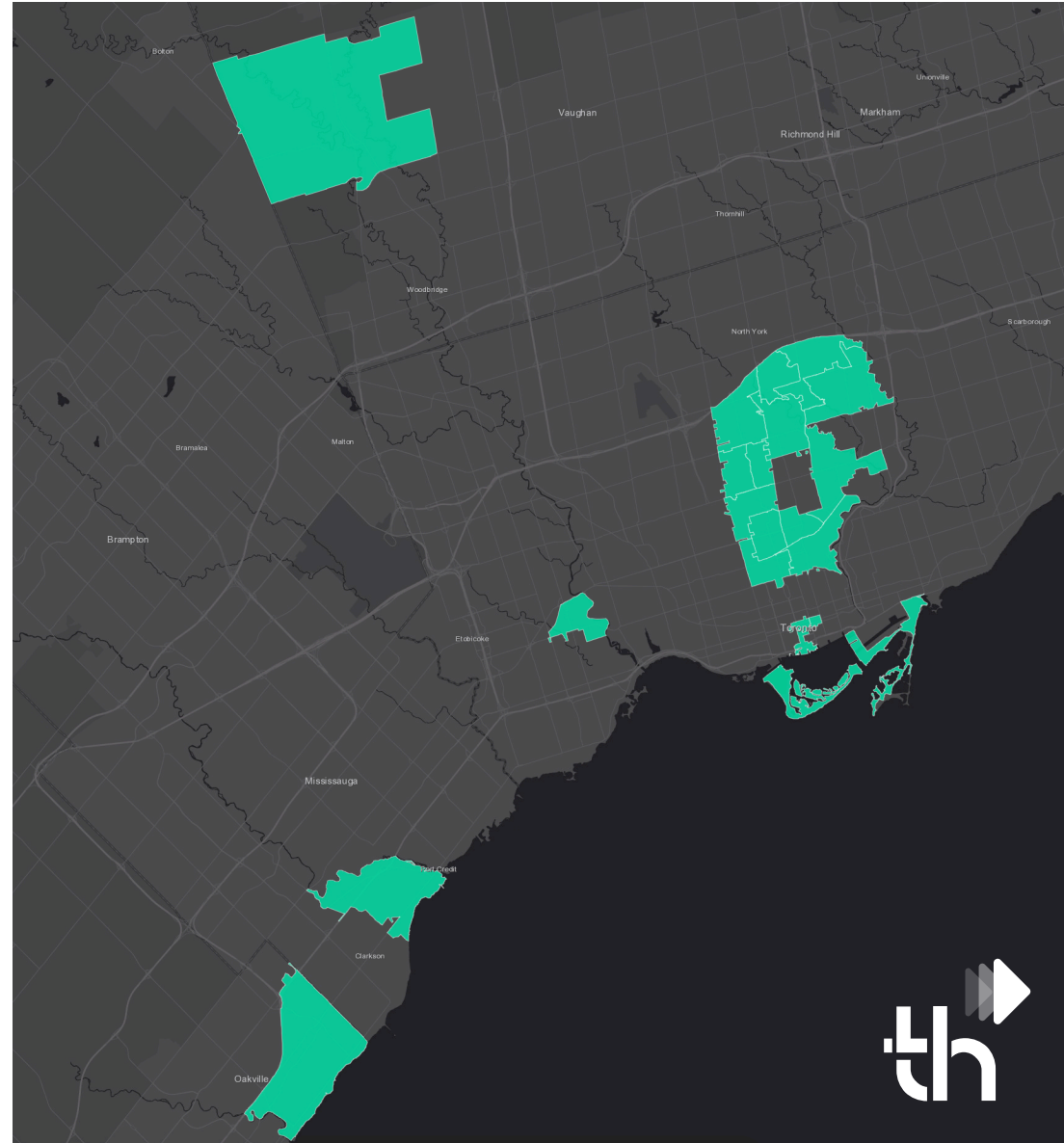
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25 GTA Postal FSAs in Ontario where the average household income is above \$80k and at least 50% of the income tax filings* show investment income. These are wealthy, investment-minded postal areas for geo-targeting online advertising via social.

*Source: <https://canada.ca> | Individual Tax Statistics by Area (ITSA) - 2017 Edition (2015 tax year)



Ontario Postal FSAs with \$80K+ average personal income and 50%+ investment activity:

FSA	Tax Returns Filed	% Returns With Investment Income	Total Income	Average Income	Total Investment Income	Total Investment Assets (est. 5.5% avg annual yield)
M4T	9,240	64%	\$1,691,333,000	\$183,045	\$427,029,000	\$ 7,764,163,636
M5X	110	64%	\$39,085,000	\$355,318	\$18,339,000	\$ 333,436,364
M4N	12,020	63%	\$2,546,182,000	\$211,829	\$704,690,000	\$ 12,812,545,455
K2R	1,020	63%	\$107,548,000	\$105,439	\$28,173,000	\$ 512,236,364
M2P	6,520	62%	\$872,815,000	\$133,867	\$293,815,000	\$ 5,342,090,909
M8X	8,770	62%	\$1,210,118,000	\$137,984	\$251,763,000	\$ 4,577,509,091
M4W	11,600	60%	\$2,350,415,000	\$202,622	\$722,489,000	\$ 13,136,163,636
M3B	12,110	60%	\$1,508,814,000	\$124,592	\$371,516,000	\$ 6,754,836,364
M5L	50	60%	\$11,237,000	\$224,740	\$5,234,000	\$ 95,163,636
N7X	970	59%	\$106,962,000	\$110,270	\$36,630,000	\$ 666,000,000
M5M	19,910	58%	\$2,410,980,000	\$121,094	\$477,292,000	\$ 8,678,036,364
M5P	14,920	58%	\$2,171,612,000	\$145,550	\$678,578,000	\$ 12,337,781,818
M2L	9,710	57%	\$1,139,587,000	\$117,362	\$400,875,000	\$ 7,288,636,364
M4V	14,010	57%	\$2,343,359,000	\$167,263	\$715,293,000	\$ 13,005,327,273
LOJ	3,890	57%	\$447,985,000	\$115,163	\$135,565,000	\$ 2,464,818,182
L6J	19,870	56%	\$2,749,458,000	\$138,372	\$705,839,000	\$ 12,833,436,364
K1M	5,120	56%	\$563,382,000	\$110,036	\$154,765,000	\$ 2,813,909,091
M4G	14,550	55%	\$1,788,486,000	\$122,920	\$301,013,000	\$ 5,472,963,636
M4R	8,690	55%	\$1,189,094,000	\$136,835	\$239,948,000	\$ 4,362,690,909
M5N	12,570	54%	\$1,516,400,000	\$120,636	\$383,324,000	\$ 6,969,527,273
M5C	3,820	52%	\$556,906,000	\$145,787	\$118,912,000	\$ 2,162,036,364
N3E	250	52%	\$20,111,000	\$80,444	\$4,448,000	\$ 80,872,727
L5H	13,950	52%	\$1,361,304,000	\$97,585	\$271,034,000	\$ 4,927,890,909
M5R	19,460	51%	\$2,349,959,000	\$120,758	\$659,737,000	\$ 11,995,218,182
M5H	2,480	51%	\$443,761,000	\$178,936	\$94,872,000	\$ 1,724,945,455
M5J	10,760	50%	\$1,012,863,000	\$94,132	\$132,047,000	\$ 2,400,854,545
K1P	660	50%	\$98,617,000	\$149,420	\$44,050,000	\$ 800,909,091
	237,030		\$32,608,373,000	\$146,370	\$ 8,377,270,000	\$ 152,314,000,000

27 Postal Regions

in Ontario with \$80K+ personal income where at least 50% of the returns contained investment income

\$152B

Total estimated investment assets based on 5.5% average annual investment yield total of \$8.3B

\$787,251

Average investable assets per person

Digital Audience Reach:

Facebook Audience	Twitter Audience	Google Display Audience	Total Reach
5,000	2,000	8,316	15,316
2,400	480	99	2,979
4,600	480	10,818	15,898
1,000	480	918	2,398
3,600	1,200	5,868	10,668
4,500	2000	7893	14,393
8,000	1,100	10,440	19,540
8,600	1,920	10,899	21,419
1,000	-	45	1,045
1,000	-	873	1,873
12,000	1,920	17,919	31,839
8,700	3,360	13,428	25,488
4,600	1,440	8,739	14,779
4,600	960	12,609	18,169
9,700	480	3,501	13,681
7,100	-	17,883	24,983
2,100	480	4,608	7,188
13,000	960	13,095	27,055
6,200	2,880	7,821	16,901
6,700	1,440	11,313	19,453
6,700	3,360	3,438	13,498
1,000	-	225	1,225
1,000	480	12,555	14,035
17,000	6,720	17,514	41,234
14,000	10,600	2,232	26,832
42,000	14,900	9,684	66,584
3,800	2,880	594	7,274
199,900	62,520	213,327	475,747

Ideal Person:

30-65 yr old homeowners
with 80k+ annual income
residing in the GTA who
are likely to be
investment-minded.

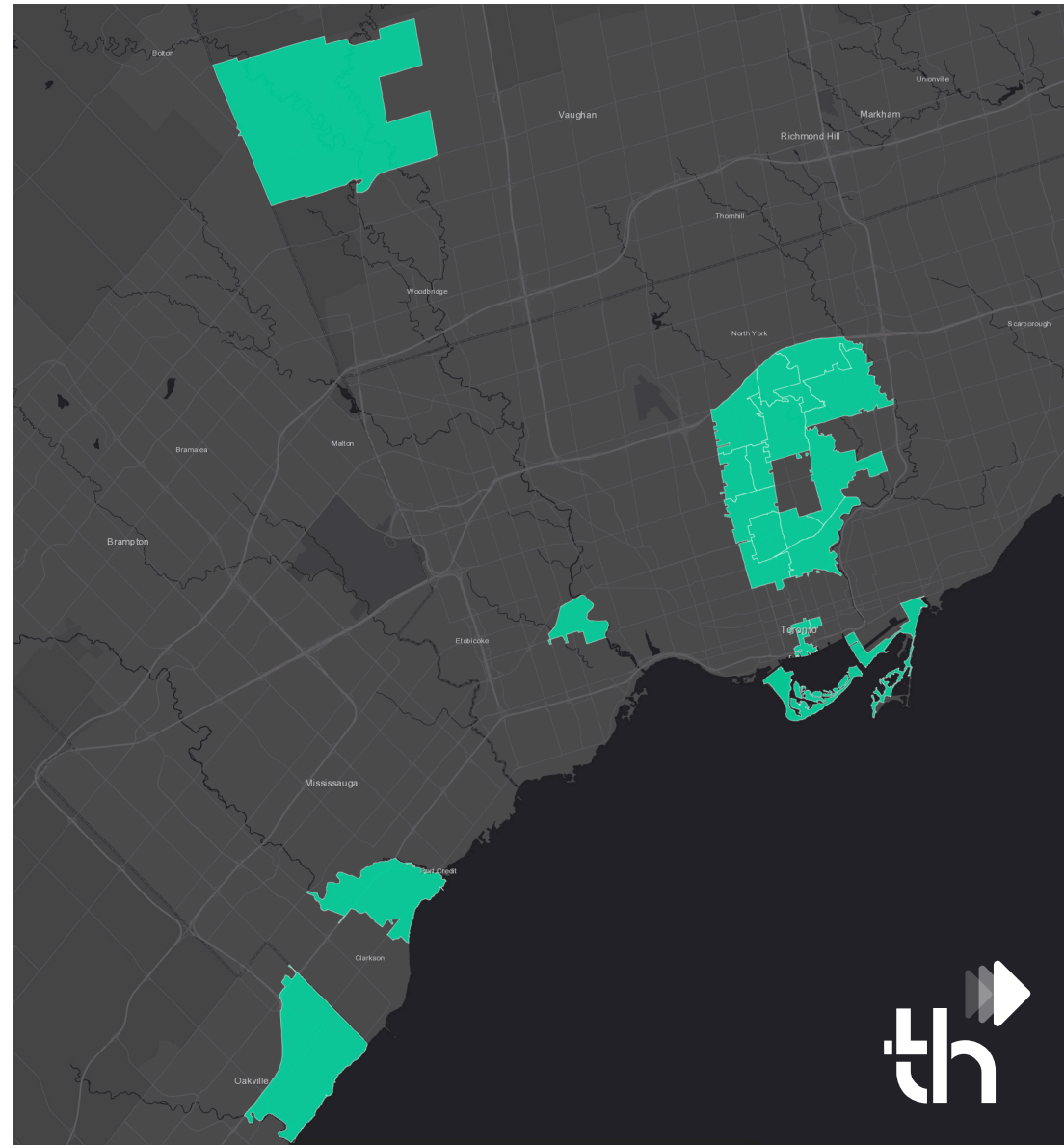


25 GTA Postal FSAs in Ontario where the average household income is above \$80k and at least 50% of the income tax filings* show investment income. These are wealthy, investment-minded postal areas for geo-targeting online advertising via social.

**Investment-Active
Postal Codes Map**



*Source: <https://canada.ca> | Individual Tax Statistics by Area (ITSA) - 2017 Edition (2015 tax year)



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with 80k+ annual income
residing in the GTA who
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25 GTA Postal FSAs in Ontario where the average household income is above \$80k and at least 50% of the income tax filings* show investment income. These are wealthy, investment-minded postal areas for geo-targeting online advertising via social.



Ideal Person Reach via Geo-Targeting:



Google Ads



199,000
reach



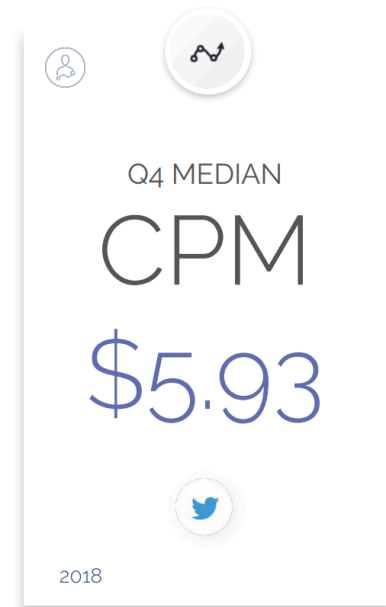
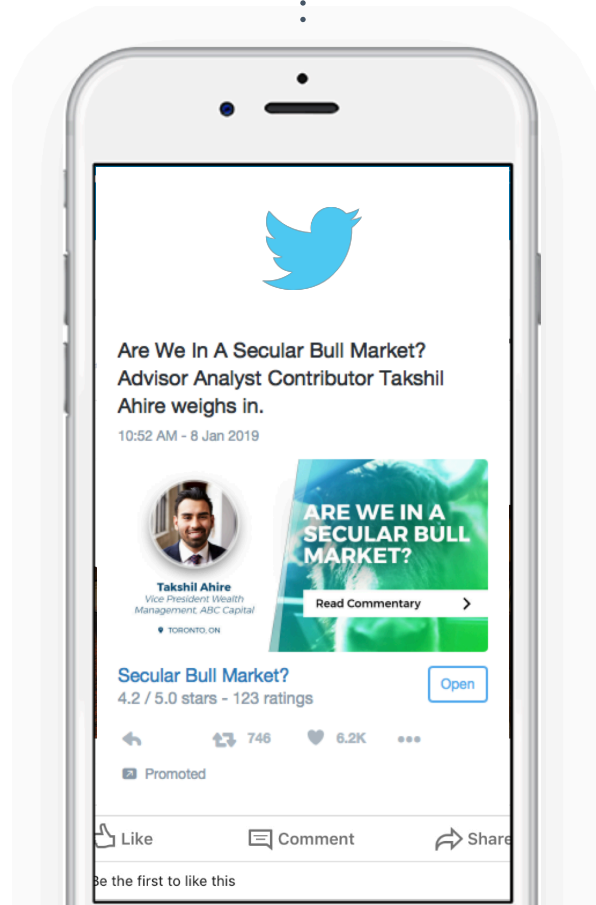
62,520
reach



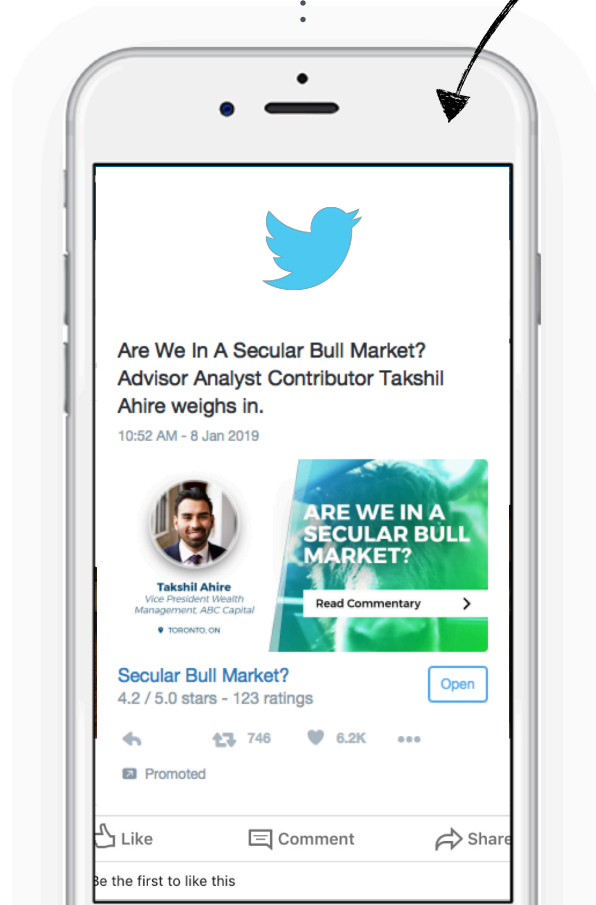
213,327
reach

*Source: <https://canada.ca> | Individual Tax Statistics by Area (ITSA) - 2017 Edition (2015 tax year)

\$5.93

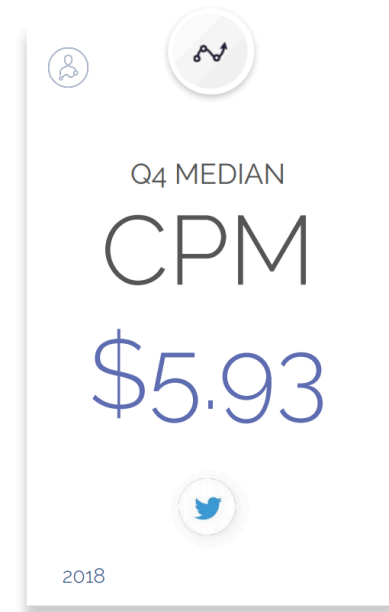


\$5.93



CPM:

Cost per 1000 times Takshil's commentary shows on the Twitter news feeds of his ideal persons audience (25 postal codes)



Leveraging Familiarity Bias & The Mere Exposure Effect

.....

Familiarity Bias:

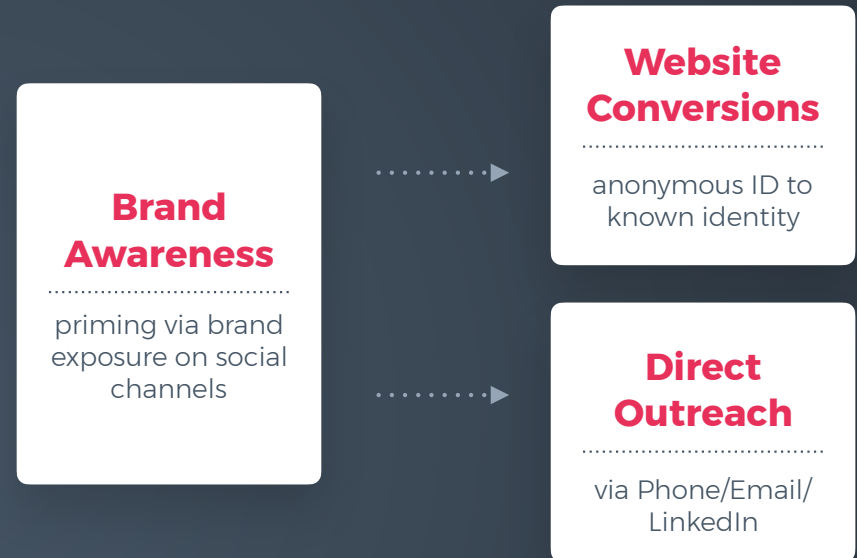
You're presented with two funds to invest in. One you immediately recognize and one you don't. Which do you pick? If we succumb to the "familiarity bias", we will pick the one that is most familiar – the fund we recognize. [Ezonomics](#)

Mere Exposure Effect:

The mere-exposure effect is a psychological phenomenon by which people tend to develop a preference for things merely because they are familiar with them. In social psychology, this effect is sometimes called the familiarity principle. [Wikipedia](#)

Subliminal Priming:

Priming refers to an increased sensitivity to certain stimuli, resulting from prior exposure to related visual or audio messages. Subliminal priming is established based on a "primed" stimuli that is below the threshold of conscious detection.



When you ensure your brand is seen by investors before reaching out directly, you position yourself to leverage brand familiarity - creating a prospect more receptive to direct outreach.



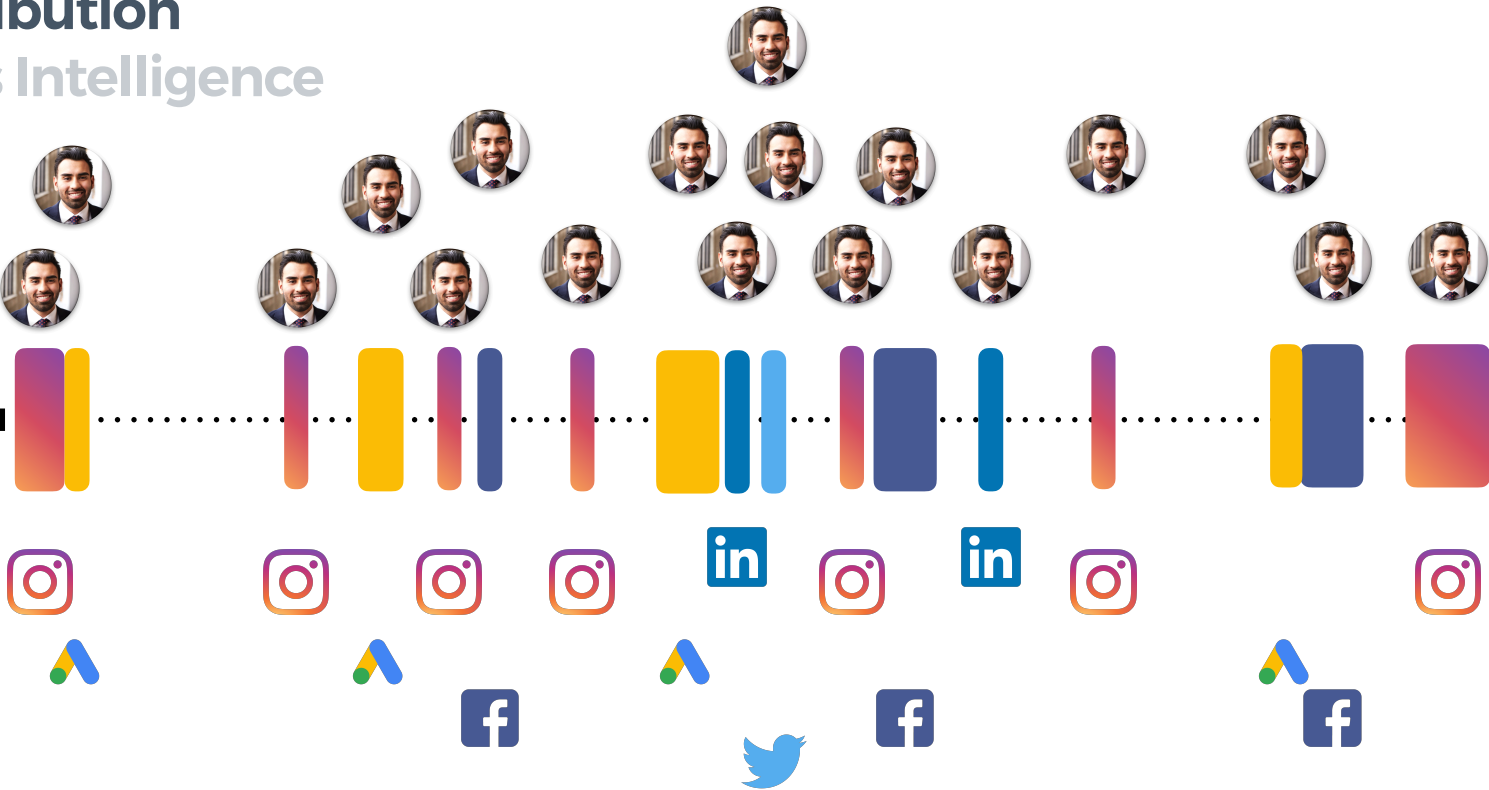
1. Story
2. Distribution
3. Sales Intelligence



Jody

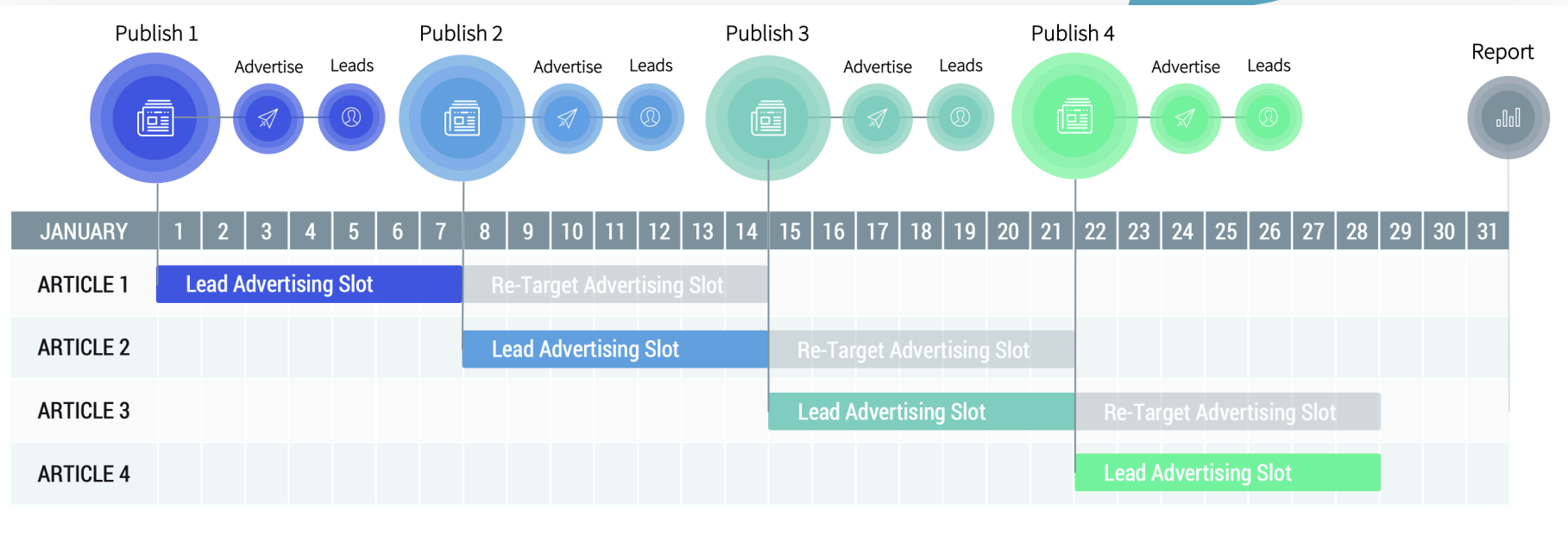
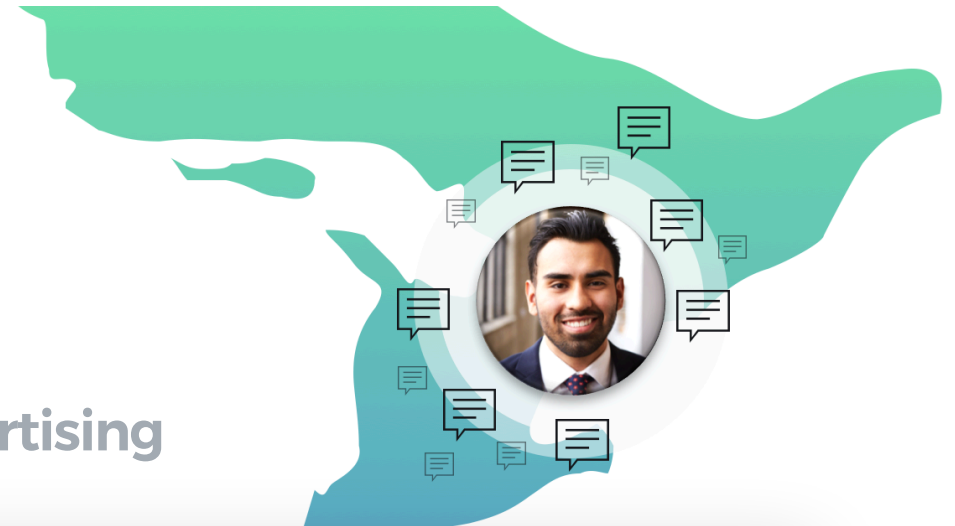
Start Day

End Day



Start Simple:

4 blog posts per month | \$5/day advertising



1. Story
- 2. Distribution**
3. Sales Intelligence

1. Story
2. Distribution
3. **Sales Intelligence**

1. Story
2. Distribution
3. **Sales Intelligence**

Are Takshil's digital marketing efforts driving a consistent flow of conversations with his ideal persons?

Traction House Website Traffic: Leaderboard

[Save report](#)[Export...](#)[Run report](#)

IDENTITY	TOTAL TIMES OF ANY EVENT	LAST VALUE OF KM REFERRER	LAST VALUE OF KM CITY
chaddweston	36	Direct	Toronto
qTnkP1ingFsh5coGNHXMGuatYbY=	8	https://lm.facebook.com/	Toronto
YxOwu2SpzBKlri/LiBEaepN1mvw=	6	Direct	Costa Mesa
Oqmc5eQypAlWjcm2hAHUE156xbA=	5	Direct	New York
3x9cHL1o4aXI7bf/TnPGzh0npwx=	5	https://www.google.com/	Toronto
1zxKnrYgvkpBJhkUHLyU/aS9GY8=	5	Direct	Toronto
a0IdbToxVc4cuGadv00mdwNBbtI=	5	Direct	Unknown
2fuwef9w9euwf838wyfydi343syf8y	4	Direct	Zurich
Va2Fx/6YvS4V2dnTCSD8peXUtBY=	4	Direct	San Francisco

Anonymous ID until identity is revealed on conversion form:

We use Kissmetrics to keep track of website visitors (and their identities).

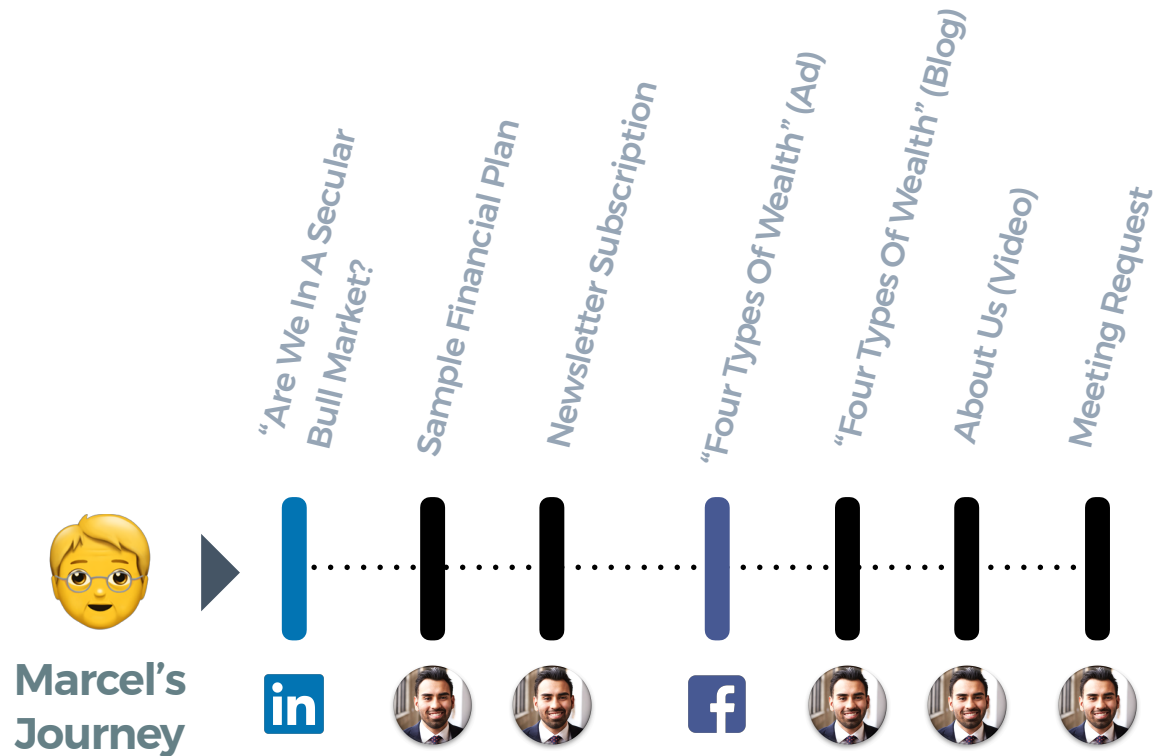
We score engagement by tracking interaction events.

We reach out to known identities showing high-engagement.



1. Story
2. Distribution
3. **Sales Intelligence**

What Intelligence
can Takshil leverage
to communicate
more persuasively
with Marcel?



Sales Focus:

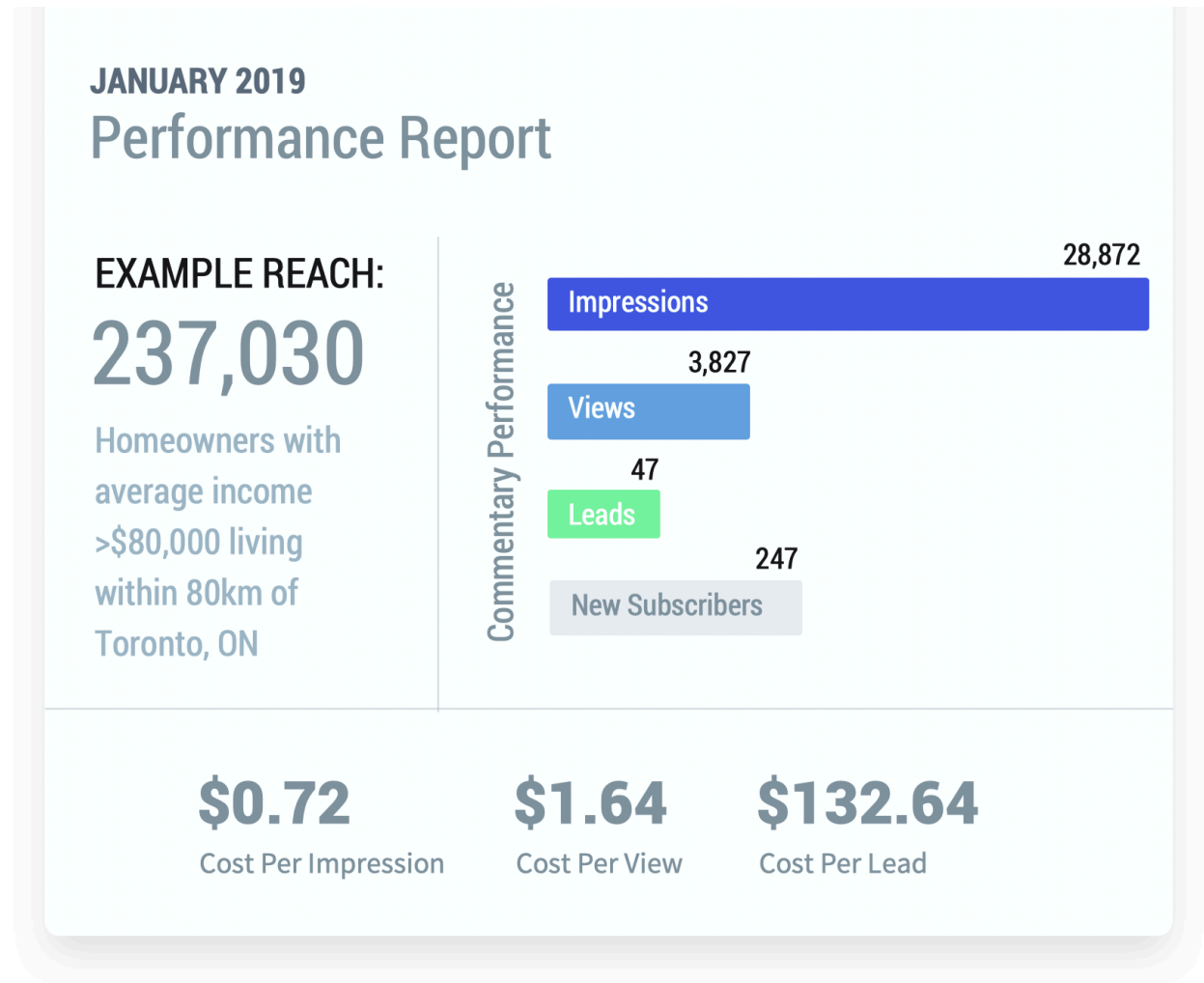
- Active Investing
- Financial Planning
- Capital Preservation

1. Story
2. Distribution
3. Sales Intelligence

Is Takshil's marketing spend building his book?

A. Yes

During the month of January 2019, out of 47 leads, Takshil closed 4 new clients and increased his AUM by \$1.3M. It cost him \$1558.52 to acquire each new client based on a \$132.64 Cost-Per-Lead.



The big picture.

The big picture.

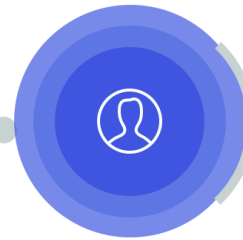
1) Publish commentary on website.



2) Advertise commentary to affluent people within driving distance of you.



3) Generate article views, new leads, and new subscribers from the website.



4) Lead Score website visitors to focus on engaged prospects only, while nurturing the rest with content.



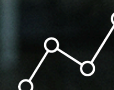
Special thanks:



Claire Van Wyk-Allan, CAIA
Director, Head of Canada



Thank You.



**MORE EXPOSURE.
MORE MEETINGS.
MORE ALLOCATIONS.**

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