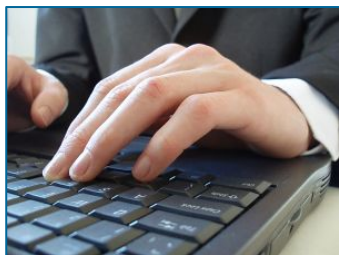


Advisor Website Creation Tips:



Before you start creating your website, take some time to really consider who you are and what differentiates you from other advisors. Creating a personal website is a perfect opportunity to re-brand yourself and to create a web presence that truly reflects what is unique about you and your practice. Your website should be forward-looking and focused on where your business is going as opposed to where it has been.

Here are some things you should consider before starting to create your site.

Brand: Before you start to create your site you should have a clear idea of how you would answer the following questions:

- Who are you?
- What is your message?
- What do you offer?
- How do you help clients?
- Why do you do what you do?
- What differentiates you from everyone else?

Most advisors find it difficult to articulate how they are different from other advisors which results in their websites looking and sounding the same. Because of this, we strongly recommend you download the Brand Workbook found on CI's Professional Development website at www.ci.com/professionaldevelopment.

Working through the exercises in the workbook will help you create a personal brand that is specific to who you are, help you identify what makes you different from other advisors and give you actual content to use on your website.

Target Audience: Determining your specific target audience or niche and what their specific needs, goals and challenges are will make it much easier to tailor the content of your site to be meaningful and relevant to them. Take some time to think about your ideal client and work on creating a website that caters to their needs. If the information on your site is not relevant to your ideal client, you are wasting your time.

As mentioned above, we recommend working through the exercises on pages 21 to 24 of the Brand Workbook to help you determine your target audience or niche.

Purpose: The purpose of your site is to establish credibility and gain the interest of potential clients so they will meet with you face to face. The information on your website should be clear and detailed enough for visitors to understand but not cover everything you would talk about in that first meeting. Think of the content of your website like the appetizer in a multi-course dinner. It isn't intended to be the whole meal but rather to intrigue visitors to take the next step to meet with you. (The physical meeting between you and the client is the best time to provide more detailed information.)

Flow: The content of your site should have a “flow” to it. Just as an essay or a speech has a natural progression, your site should also. For example, a speech would have an introduction (on your website this translates to who you are, what you do), a body that includes some main points (how clients can benefit, your products and services and other relevant information) and a conclusion (your personal and branch contact information).

Navigation: Visitors should be able to navigate throughout the site with ease. You should provide clear headings for all your pages and the fewer clicks it takes to get from point A to point B, the better. The longer it takes for someone to navigate through your site, the more likely they will leave your site and look somewhere else. Visitors should not have to guess what information is found under a specific heading so avoid using short forms, acronyms or slang in your titles.

Filler: Each page on your site should have something valuable to offer. The content you add should be relevant to your image, your message and the products and services you are providing to clients. When adding any images, links or text to a page, keep your ideal client in mind and consider if what you are planning to add is valuable to them. If you have doubts about the value of something, leave it out.

The quality of your content is more important than quantity.

Do’s and Don’ts: Many people think that flash intros, scrolling text, animated GIF’s and auto-play videos/music enhance the visitor’s experience because they look neat and flashy. These effects usually become a distraction and cause your site to look unprofessional and gimmicky.

Reading on a computer screen is much more difficult than reading a book so it is best to break up blocks of text with ample spacing and/or relevant images. Avoid content that is many pages in length as visitors will not scroll down repeatedly and your content will go unread.

Review: Content should be clear and consistent throughout your site and should be aligned with the messages you convey in person. Headings, fonts, line and picture spacing etc. should be consistent on each page. Carefully proofreading all content is very important. Spelling and grammar errors will portray an unprofessional image.

It is also good practice to avoid using “industry speak” and buzz words as they may confuse the visitor rather than provide value. Have someone who is not in the industry read through all of your content to ensure that it is easy to read and comprehend.