



## Advising the adviser

# shadforth takes off online with Lucy Bingle

Working with Lucy Bingle, leading financial advice firm Shadforth has dramatically increased their online presence.

Financial advisers deal with aspects of tax optimisation, superannuation and investment that for many of us are complex and arcane. It's this complexity that makes financial advice so important, yet getting this message across can be a challenge.

### Wealth needs advice

Tina Anderson, Shadforth's National Marketing Manager, understands this problem only too well.

*“People’s need for advice grows with their wealth,” says Tina, “and anyone with more than \$500,000 to invest is going to need advice sooner or later. We’re particularly focused on people who are maybe ten years out from retirement and need help with things like wealth creation, transition to pension phase, estate planning and tax minimisation.”*

When she took on the role three years ago, Tina noticed many advisers had aging books and an average client age of 67, so she took on the challenge of attracting younger clients.

*“We knew that we needed a strong digital strategy to build awareness of the value of advice in general, and to promote the Shadforth brand,” says Tina, “we needed a cross channel approach to reach our target market, and LinkedIn formed a key part of this.”*



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## A team of experts

Tina outsourced her LinkedIn strategy. This is where Lucy Bingle came in.

*“Lucy contacted us about doing a network build-out for our CEO,” says Tina, “and she had some very compelling arguments. I could see the potential and decided that this would be the ideal way to expand our digital presence.”*

Lucy matched her client with an account manager who not only understands the wealth management industry but the firm’s philosophy and advice model.

*“It was an inspired choice,” says Tina, “our account manager understood all the intricacies of the financial advice business and wealth management, even down into the weeds of superannuation. Not having to explain anything made a huge difference and we were able to hit the ground running. It’s a perfect fit really.”*

## Et voila!

The LinkedIn strategy soon generated tangible results.

*“When we started working together last year we had about 3,000 followers on LinkedIn,” says Tina, “now we have close to 4,700 and it’s growing daily. We’re rapidly approaching a tipping point because the content we’re producing is resonating with people.”*

*The last six-week digital campaign we ran generated an extra 4,000 visitors per month to our website. That’s just a phenomenal result, but we also learnt a lot from it that’s helping form our future campaigns.”*

## Learning from experience

Analysing post engagements and website traffic from LinkedIn gives us insight into behaviours, including which messages are resonating with people, and allows us to adapt our approach accordingly. That’s the beauty of digital.

*“Every time we do something on LinkedIn we learn more,” says Tina, “it’s an iterative approach, and we’re getting better at it every time. Having an expert who understands the algorithms and knows which call to action will work and why makes a huge difference. The material we work with is complicated and hard to express simply, but Lucy Bingle’s team do a superb job.”*



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## Value for money

When compared with more traditional marketing avenues, Tina is particularly impressed with the value for money of LinkedIn campaigns.

*“We’ve run campaigns in the mainstream media at a cost several orders of magnitude higher compared with LinkedIn, and the results have been disappointing. When you compare the cost per click it’s an absolute no-brainer.”*

Getting the people inside the business involved is another aspect to Tina’s strategy.

*“Financial advisers are incredibly busy people, so getting them to contribute material isn’t easy, but it’s always rewarding when they do. It’s also about teaching them the simple tips of engagement – a thumbs up or a clap and a comment is quick and easy and provides the support that amplifies our Shadforth brand enormously. This all contributes to the value of the campaign.”*

## Building momentum

During the next 12 months, Tina will be expanding her LinkedIn campaigns and extending her digital reach.

*“There’s a risk of some digital fatigue as we come out of the pandemic,” says Tina, “but I think that’ll only be temporary. Our digital strategy has proven that it works, and Lucy Bingle has been a big part of building that success.”*

*“We’ve had measurable improvements across our LinkedIn strategy, and a lot of that comes down to the guidance of the Lucy Bingle team,” says Tina, “I simply don’t have the expertise, the knowledge or the time to run this myself, I’m basically conducting an orchestra here, and Lucy Bingle is the string section.”*

[www.lucybingle.com](http://www.lucybingle.com) e [lucy@lucybingle.com](mailto:lucy@lucybingle.com)



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