



*Feed*


*How to Stand Out  
(& Attract Clients)*



(IT'S THE LAST ONE, IT HAS SUGAR IN)

# *What we're NOT gonna cover today*

- Post consistently on LinkedIn.
- Show your personality.
- Tell your story.
- Improve your branding.
- Try TikTok.
- Use video.
- Start with why.



Let's play

*Homepage bingo*

We help a broad range of clients plan for a  
successful financial future

We provide tailored, expert financial advice  
for every generation

We help individuals and families build and  
preserve their wealth

Tailored financial advice from a partner  
you can trust

# *What's the cost of being a blue cup?*

Slowing & lost revenue

Fewer good enquiries coming in

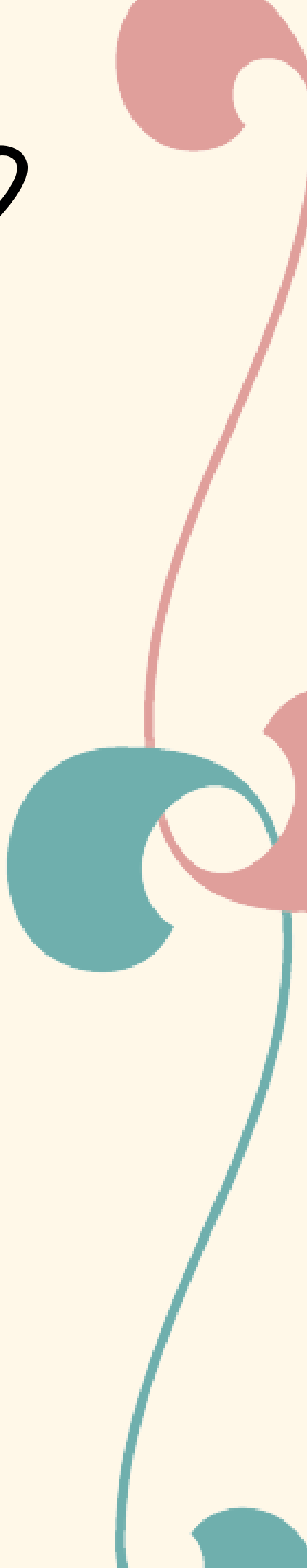
Price becomes the only differentiator


Wasted marketing spend

Vulnerability to shifts in market

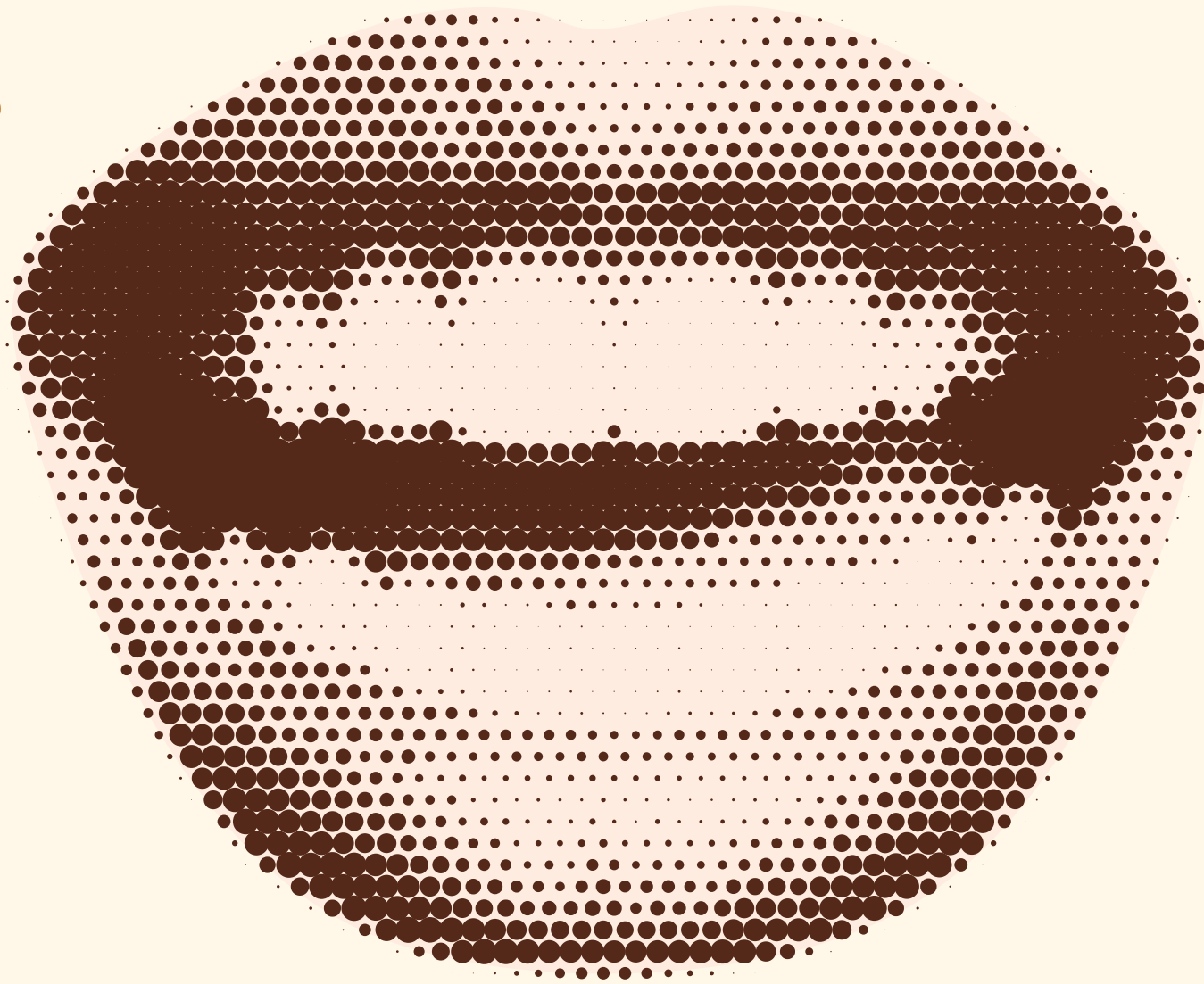
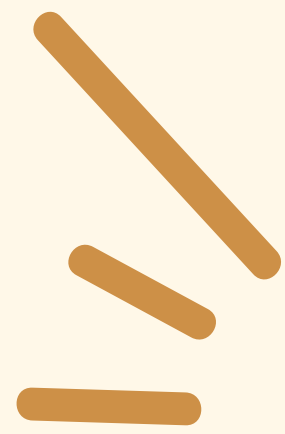
Difficulty in attracting top talent

Founder/leadership pressure



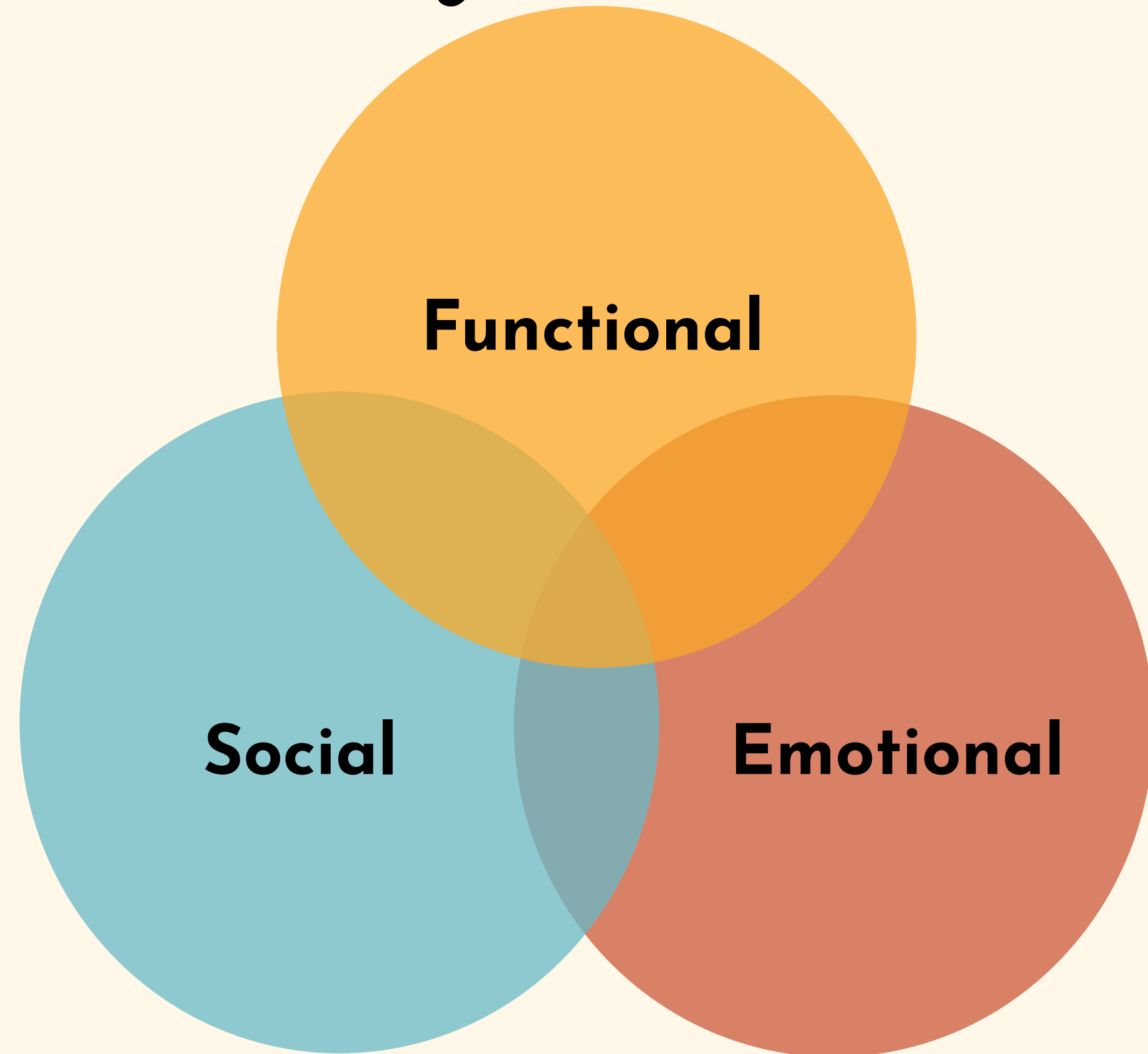


*How do you stand out?  
(and become a green cup)*



# *Why we buy*

We buy to solve  
three problems



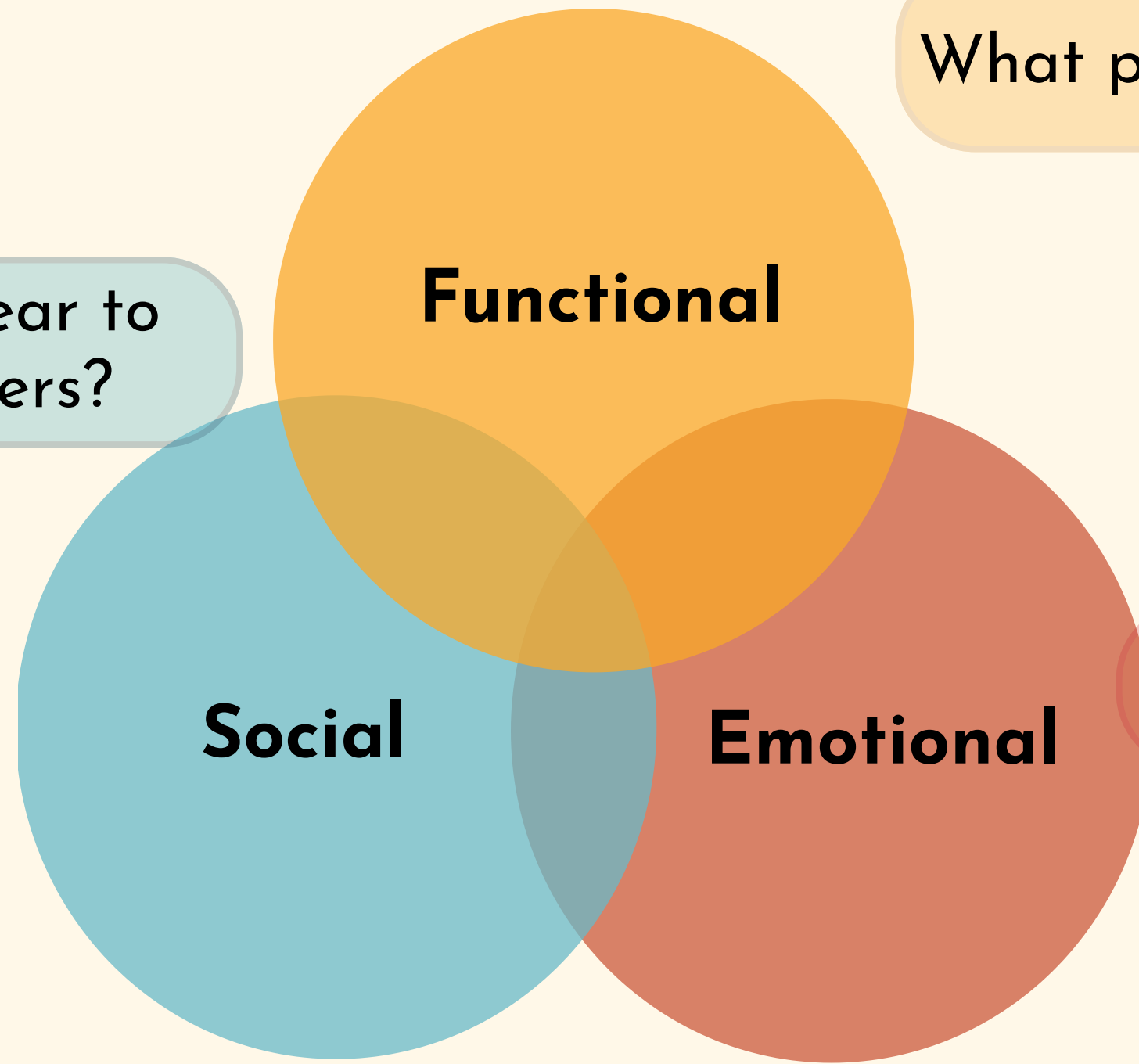
# Why we buy

What practical need do they have?

**“I want a plan for my money”**

How do they want to appear to bosses, family, stakeholders?

**“I want to be seen as responsible and a good protector by my family”**



What feeling are they chasing?

**“I want to feel confident, in control, less anxious”**

# *What clients actually say...*

"I stopped feeling like this was something I should understand better but never quite got round to"

"It gave me confidence to enjoy life a bit more instead of constantly worrying"

"They made something overwhelming feel manageable"

"I feel like a more responsible grown-up, if I'm honest"

"It means I know we're doing the right thing, not just hoping for the best."

# The Gap

*What clients are buying  
(from their words)*

- Peace of mind
- Feel in control
- Reassurance that they're making good decisions
- To be seen as a good steward of money

*What they're selling*

Tailored  
financial advice  
from a partner  
*you can trust.*

**Clients are buying peace of mind, reassurance and looking responsible.  
They're selling 'tailored advice'**

*Stop. Mic drop*

Take a second.

Think about your organisation.  
What are the 'real' reasons people buy from  
or support you?

Is that on your homepage?



# Stop. Mic drop

- 👉 Could your three nearest competitors say exactly this?
- 👉 Does this describe what you do – or what it does for your clients?
- 👉 If a stranger read this, would they feel anything?

# Hello charities



# *Hello charities*

"...Over the first quarter of the twenty-first century branding will become a powerful force in charities. Major charities will capture our concern and interest and our money.

They will link us to individual cases and personalise it all.

**This kind of commitment to charities will enable us to feel better about ourselves."**

*On Brand, Wally Olins*

A little MORE  
conversation please





# *How*

- Pick 3 - 5 clients/donors
- Ask 4 questions
- Review testimonials / feedback forms
- Look for patterns

*Ask...*

- 👉 Why did you choose us?
- 👉 What nearly put you off?
- 👉 What changed for you after working with us / after giving?
- 👉 What do you tell other people about us?



# *From their words to your words*

## *They said*

“It gave me confidence to enjoy life a bit more instead of constantly worrying about money”

## *The insight*

Clients aren't buying a financial plan.  
They're buying relief, freedom & sense they're doing the right thing

## *The messages*

Copy & content that speaks to the life your clients are now living, not their % returns

*Now what?*

*Where do you use that insight?*

**1. Revise your homepage**



CHANTAL  
LEVESQUE  
P H O T O

[ABOUT](#)


[PORTFOLIO](#)

[PRICING](#)

[COMMERCIAL](#)

[BLOG](#)

[CONTACT](#)



BADASS  
DOG  
PHOTOGRAPHY



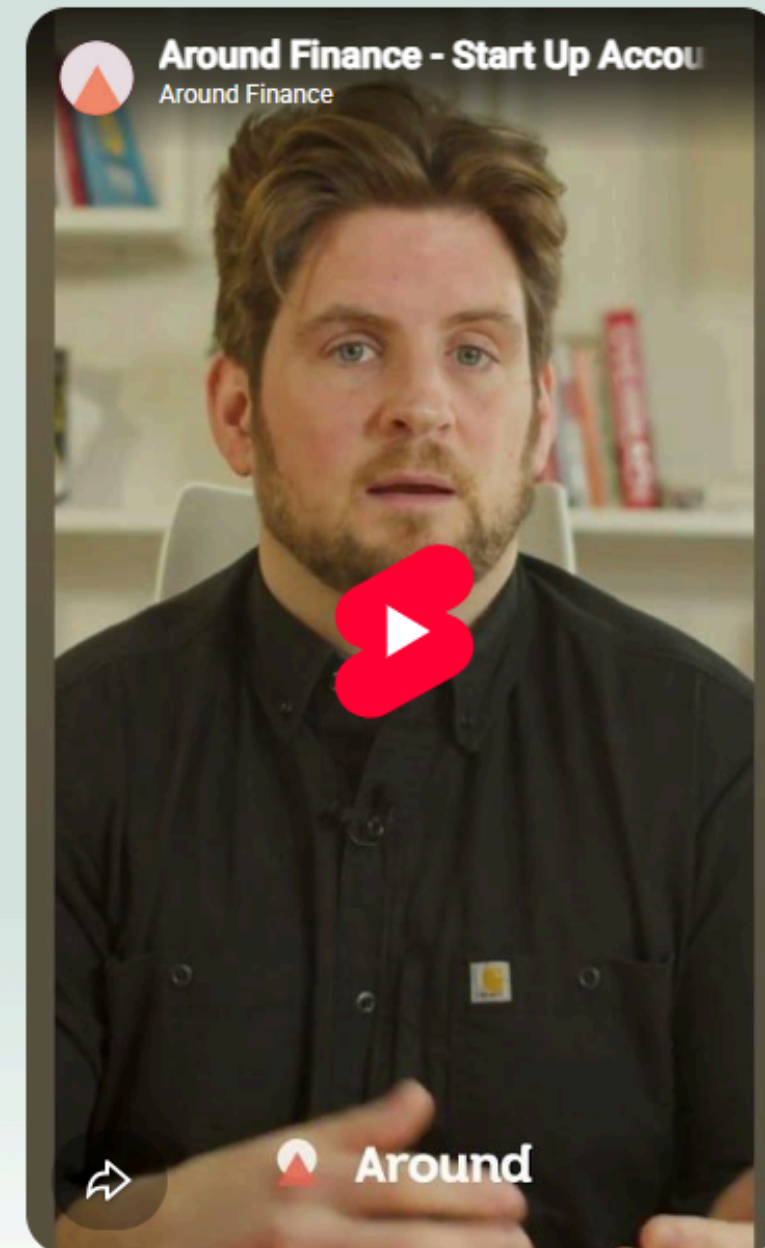
# Outgrown your accountant? Most founders have.

Replies take days.  
Year-end becomes a scramble.  
You hear about tax breaks from other founders — not your accountant.

That's not how this should work.

We get the basics right. Every month.  
Advisory when you're ready.

**Fixed monthly fees. Clear scope. No surprises.**

[See If We're A Fit](#)

## MUSCLE-BUILDING FOR SKINNY GUYS BY SKINNY GUYS



If you're a skinny dude who wants to build muscle, bulk up, and gain weight, I think you'd love our newsletter. It kicks off with a 5-part series that covers:

*Now what?*

## **2. Sharpen your intro**

*Instead of "I'm a marketing consultant"*

I work with business leaders and founders who are brilliant at what they do – but struggle to explain why anyone should choose them over others.

I help them find what makes them genuinely different and turn it into marketing that gets them seen, chosen and referred.

*now what?*

### **3. Create better content**

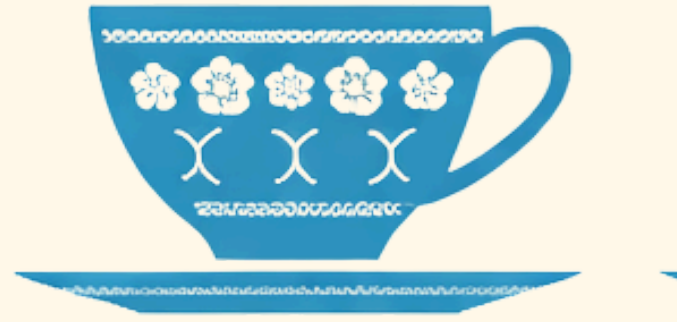
*"I stopped feeling like this was something I should understand better but never quite got round to"*

You don't need to understand investing to make good financial decisions

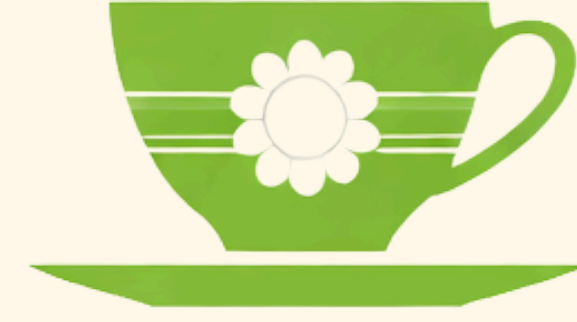
3 reasons why most people put off getting financial advice – and what it costs them

# Your homework

- 👉 Book min. 3 coffee dates with your fave clients/donors
- 👉 Audit your marketing - website (homepage & about), content, social bios
- 👉 Play with your intro - instead of "I am....."  
You know how a lot of [audience] struggle to [problem]?  
It means they end up [cost or consequence].  
[I/we] help them [solve or achieve].  
So instead of [before state], they get [after state].



Tailored  
financial advice  
from a partner  
*you can trust.*



Financial advice  
that makes  
sense of your  
life, not just  
your money.



# Feed

*The world doesn't need more blue cups.  
Go be a green cup.*

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