

# Standing out from the crowd

The 2020 Financial Services Playbook



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Be stand-out

# The FinServ challenge

To thrive in today's digitally-transformed world, FinServ organizations face unprecedented challenges. They must be authoritative and authentic. They must be thought leaders and trustworthy. They must convince prospects and prospective employees alike that they are not corporate behemoths but 'human'.

They must stand out – for the right reasons.

Communicating the right messages – to the right audiences – is crucial. But FinServ marketers must overcome myriad challenges.



Be stand-out

# Meeting the challenge

To attract, engage and retain customers and talent. To cut through the content noise. To measure marketing ROI.

LinkedIn can help FinServ marketers meet their biggest challenges. This playbook will show you how.

It's time to stand up and stand out.

LinkedIn has helped many FinServ institutions grow, as well as helping their hard-working marketers grow their own contributions to the business.

Be a thought leader

“Thought Leadership has the potential to significantly influence brand perception and buying behaviors.”

Source: 2020 Edelman-LinkedIn B2B Thought Leadership Impact Study



## Be a thought leader

# The importance of standing out

Why is thought leadership so important?

From a bottom-line perspective, decision-makers use thought leadership to evaluate potential vendors and partners. In fact, 49% of decision-makers say that thought leadership can be effective in influencing their purchasing decisions.

And for the FinServ marketer, it's a vital tactic all along the funnel – from acquisition through engagement to retention and advocacy.

For customers and talent alike.

Having engaged with thought leadership,

42%

of decision-makers invited the organization to bid on a project when not previously considering them.

48%

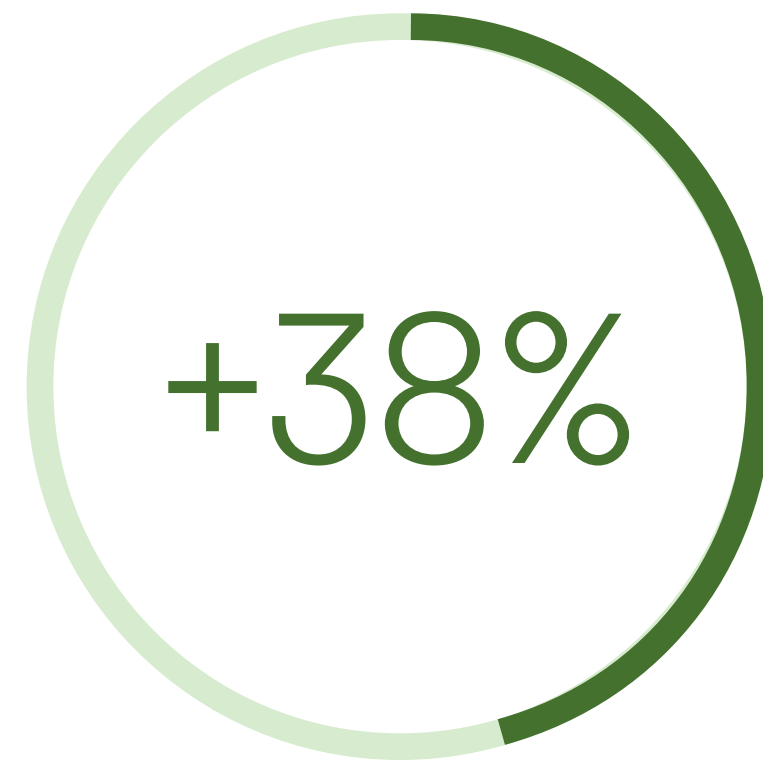
directly awarded them business.

53%

decided to increase the amount of business they did with them.

Be a thought leader

# The thought leadership risk



of business decision-makers said thought leadership has decreased their respect and admiration for an organization.

But the thought leadership space is saturated. Being heard over the hubbub is harder than ever.

While consumption of thought leadership is growing – almost half of decision-makers spend one hour or more reading it a week – there’s a risk associated with publishing content that’s not truly thought-leading.

Decision-makers are most often disappointed in the quality of the thought leadership content they read, with only 15% considering it ‘very good to excellent’.

While they often didn’t think it provided valuable insight, with 28% considering it ‘mediocre to very poor’.



## Be a thought leader

# Be truly thought-leading

Don't just add your voice to the noise. Stand out from the content crowd with truly leading thought leadership.

Create impact, gain share of voice, establish credibility and authority, build brand reputation and gain ownership of the key competitive categories that are most relevant to target audiences and key accounts.

Position your brand as leader-in-field by enabling expert voices to share their insight and show their experience. Share unique primary research and proprietary data to show authority.

Show you're a thought leader.  
Win the marketplace.



## Why LinkedIn

# A strategic platform for success

According to the Content Marketing Institute, LinkedIn is the most effective platform for content marketing. It's where 82% of B2B marketers realize their greatest success.

Publishing thought leadership on LinkedIn can help drive higher quality customer acquisition, brand awareness, meaningful engagement and reputation with high-value audiences in a trusted environment where they are in the mindset to engage, driving efficient and measurable impact from brand to demand.



## Why LinkedIn

# The leader for lead gen

LinkedIn is the top social network for lead generation, by a long shot. And it's the most impactful social media channel for lead generation among B2B marketers.

79%

of marketers view LinkedIn as an effective source for generating B2B leads.

92%

of B2B marketers leverage LinkedIn over all other social platforms.

80%

of B2B marketing leads sourced through social media come from LinkedIn.

Be always-on

Be always-on

# Be holistic

FinServ decision-makers need to be continually abreast of trends and ahead of the curve. So stand out by arming your audience with fresh, future-focused FinServ insights.

Stay front-of-mind by communicating throughout the sales cycle and along the marketing funnel with a long-term, joined-up, holistic marketing strategy.

But because of internal silos and fragmentation between lines of business, FinServ marketers often run disconnected, product-led campaigns focused on either top or bottom-funnel that don't speak to their brand's bigger story.

Stay ahead, focus on the big picture, keep standing out.



**Be always-on**

# Be in the conversation

Continually educate and engage, inform and interact, communicate and connect with your target audience. With content from in-depth thought leadership pieces through to snackable content.

Constant visibility not only helps you to stand out but also to develop brand affinity and build a community of advocates.

**Don't just join the conversation, start it, lead it.**



Be always-on

# Be social

From retail banking to asset management, FinServ players are on social media – its relevance and value is no longer questioned.

Now companies and top executives know that participation is essential because of its potential impact.

Participation on LinkedIn is the most valuable – because it is the platform with the highest quality environment that creates a halo effect for brands, has the most effective always-on product content solutions, and the best cost efficiency compared with other social platforms.

98%

of investors use social platforms, such as LinkedIn and Twitter, to inform investment decisions on a weekly basis.

86%

of investors say they consult a company or an executive's social media channels when evaluating a current or prospective investment.

40%

companies engaged on social media are 40% more likely to be perceived as competitive.

58%

are more likely to attract top talent.

## Why LinkedIn

# Be targeted

But being always-on isn't always enough. Your content must reach the right audience with the right messaging.

You might start a campaign by publishing top-of-funnel awareness content to the many, but when you need to zero in on warm prospects or specific accounts, LinkedIn's precision targeting solutions can deliver tailored content to the few, to those users who matter most to you, all along their personal content funnel.

LinkedIn can target those who matter most – so you stand out in their inbox.





**Be always-on**

# Be professional

## Targeting quality audiences

With LinkedIn, you can target a quality audience in a professional context. Market to FinServ decision-makers, influencers and executives with the help of LinkedIn's data power and suite of targeting solutions. Then customize your targeting with your own audience data to nurture interested prospects, leads and contacts:

### **Rich first-person demographic data**

Use real, member-generated demographic data to reach the right audience: job title, seniority, level of experience, industry sector, geography, company name and more.

### **Interest-based targeting**

Selectively target by group membership, skills, field of study, LinkedIn keywords and topic search. E.g. CMOs concerned about cybersecurity or small business owners seeking point-of-sale solutions.

### **Persona-building**

Combine targeting criteria to build your ideal financial personas.

Be trusted

**Be trusted**

# The trust imperative

Your brand may be demonstrating its thought leadership through an always-on program of content. Being always-on builds trust, but you must still overcome a persistent lack of trust in FinServ.

According to the 2019 Edelman Trust Barometer: Financial Services Report, trust in the sector is at its highest level since 2012... but it still remains the least-trusted sector measured.

And in our digitally-dominated, post-trust landscape, people trust individuals far more than institutions.

Only by establishing and maintaining trust in your brand, will your thought leadership and other content be perceived as authentic. And buyers will trust you.

**Be trusted**

# The human touch

To satisfy customers' hunger for authenticity, keep the conversation 'human' – even in your most in-depth, long-form pieces.

Be empathetic with your customers. Acknowledging and understanding their concerns is the surest way to build confidence and trust. Be transparent, create an open and two-way dialogue, and focus on providing customer value.

**“Empathetic, authentic content is trustworthy content.”**

Source: 'Peer Stories And Credible Data Attract And Engage B2B Buyers' – Forrester.



**Be trusted**

# Employees as influencers

Don't be afraid to express your brand's employee voices – harness the power of executives, subject matter experts and employees. Let them speak, let them tell their stories, let them stand out.

As LinkedIn members trust content from their peers, and a greater percentage (81%) of FinServ employees have more trust in their employer than in any other sector, leverage your employer trust advantage by deploying your employees as advocates and influencers on LinkedIn.

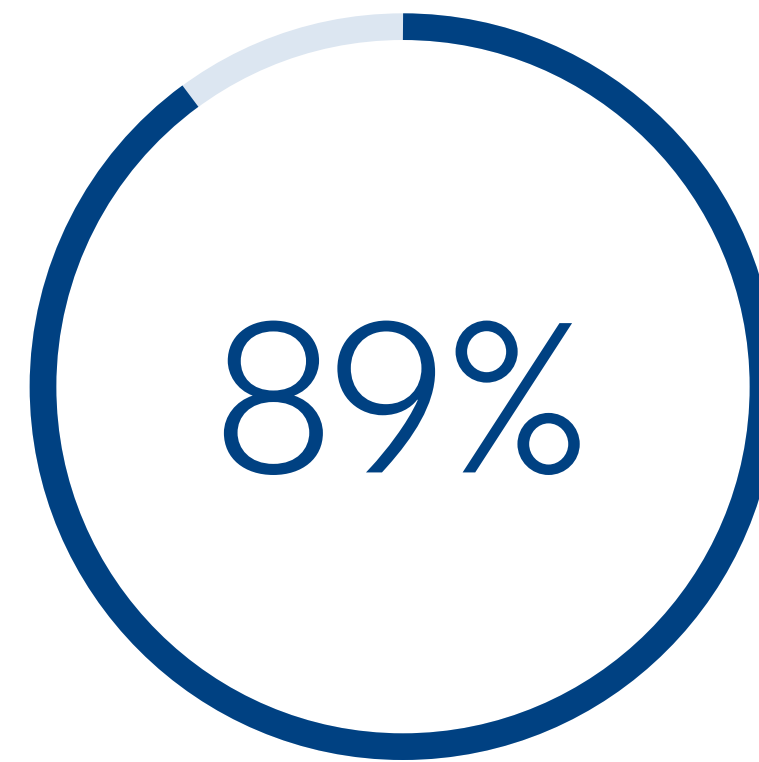


## Be trusted

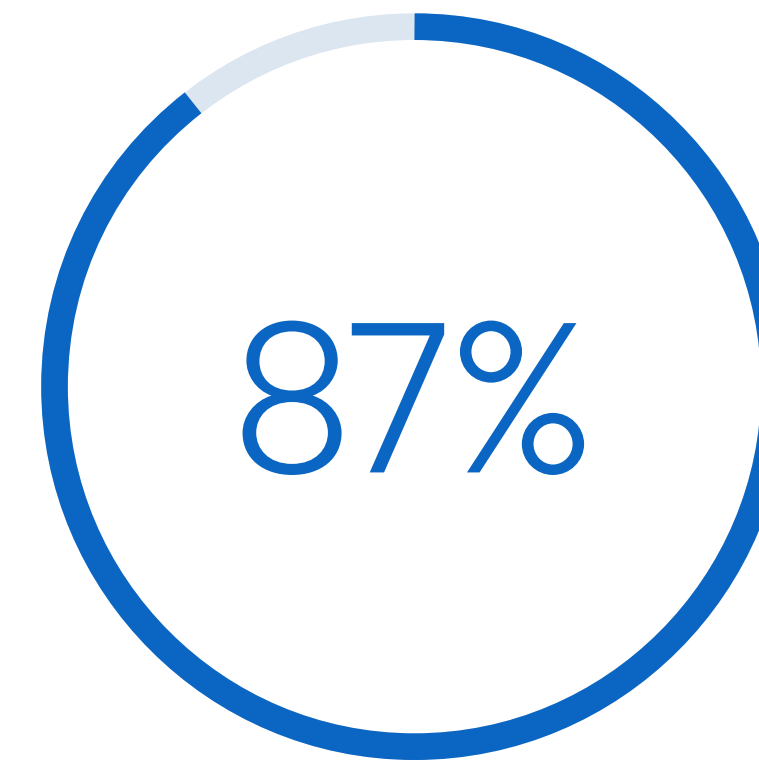
# Trust in thought leadership

Trust is a critical factor in getting engagement at strategic buyer and C-suite levels. How do you earn trust? With thought leadership. Thought leaders are trusted.

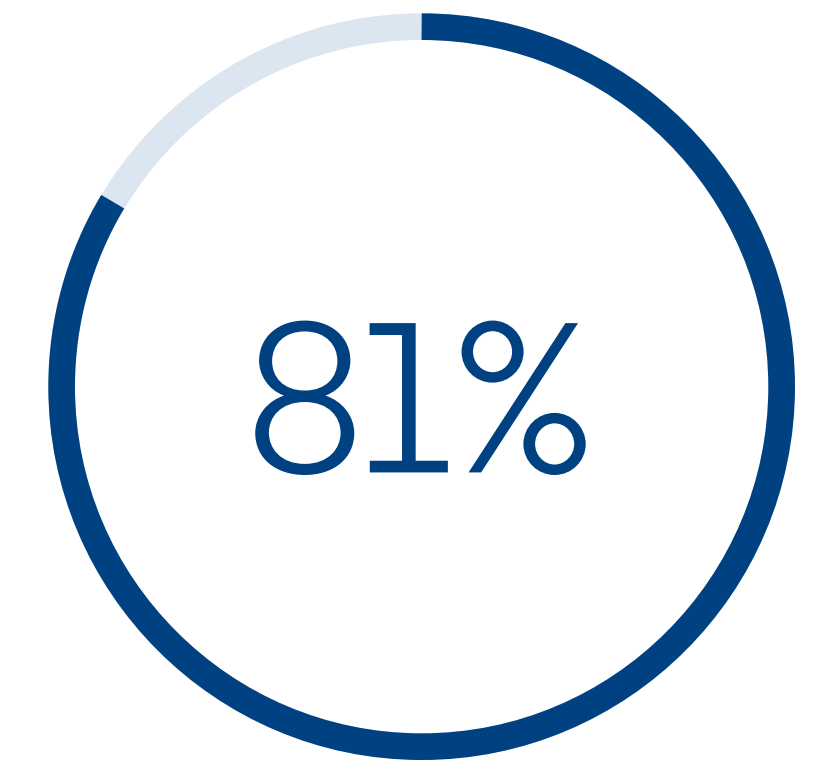
‘Top executives recognize that transparency builds trust.’



of business decision-makers say that thought leadership ‘increases trust in an organization’.



say it enhances a brand’s reputation.



say that thought leadership being shared by someone they know and respect is a critical factor in getting them to engage.

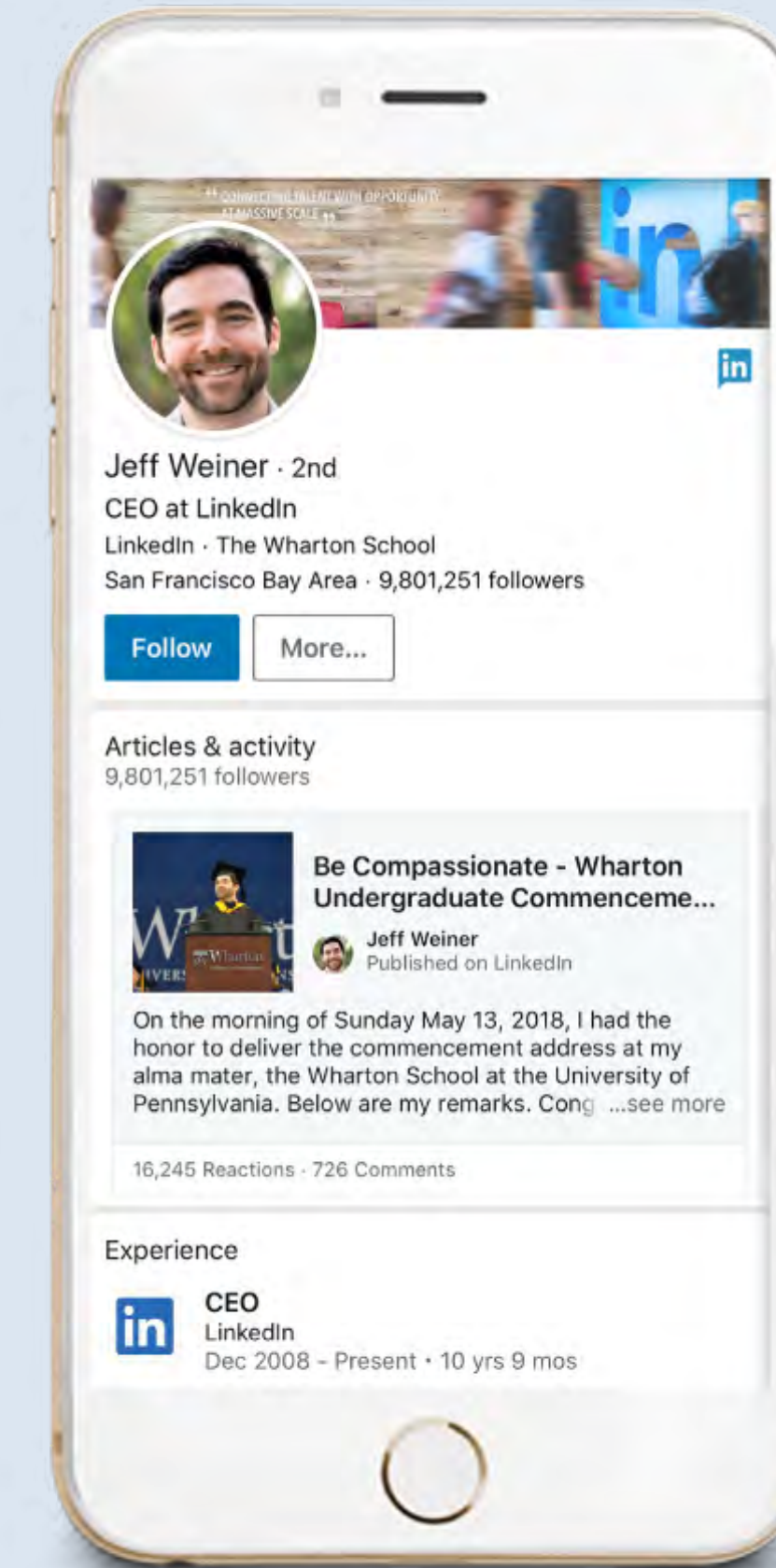
## Why LinkedIn

# A trusted environment

Context is as important as content: your thought leadership needs a trusted stage to perform.

Social media is the obvious channel for dialogue, but LinkedIn is so valuable because of the trust its members place in it.

According to the Business Insider Intelligence Digital Trust Report 2019, LinkedIn was the most-trusted platform among respondents for the third year in a row. LinkedIn's quality context will have a halo effect for your brand.



LinkedIn is 'undisputedly the most trusted social platform'.

## Why LinkedIn

# The medium is the message

As context is vital to trust, brands need to be sure of the company they keep. They're in good company on LinkedIn, which has the world's largest professional audience, including 63 million decision-makers, and – according to 91% of B2B marketers – is considered to be the social platform for serious business messaging.

Your content will be sharing space with like-minded brands and influencers, not intrusive pop-ups, or worse, with offensive or abusive content. LinkedIn delivers unparalleled customer – and advertiser – trust for your brand.





## Case Study

# AIG

As a large global organization, AIG identified that there were issues with how its brand was perceived.

The company sought a way to share knowledge to create a dialogue that would help enhance brand perceptions, stand out from competitors and influence and establish meaningful relationships with its target audiences of C-suite insurance decision-makers, risk managers, insurance brokers and consumers interested in life and retirement insurance.

Through its strategic partnership with LinkedIn Marketing Solutions, AIG maximized engagement with its audiences by sharing valuable content that positioned it as a resource that offers thought leadership and insights.



270k

Bronze Award Winner – Corporate Image Financial Communications Society Portfolio 22 Awards.

new followers through a measured approach targeting the right members at the right time.

100k+

relevant professionals reached through their LinkedIn inboxes over six months.

Be measurable

“Failure to calculate ROI hides the true impact marketers are delivering to the business.”

Source: 'The Long and Short of ROI: Why Measuring Too Quickly Complicates the ROI Story for Digital Marketers' – LinkedIn Marketing Solutions



## Be measurable

# The long and short of ROI

FinServ marketers aspire to helping their brand to stand out from the competitive noise, to be a trusted thought leader that influences customers, prospects and key strategic buyers.

But those marketers' efforts cannot be valued as they should by their employers without being able to attribute sales leads and business wins to thought leadership. To attribute, they must prove ROI.

**74%** of thought leadership producers can't link their content to sales or wins.

But they are measuring ROI too quickly. Too often they measure KPIs, which show the short-term impact of their campaigns, rather than ROI over the full sales cycle.

This short-term thinking means marketers lose out in the long term. It hides the true impact that their thought leadership-driven always-on content strategy is delivering to the business.

## Be measurable

# Short-term pressures

Why do FinServ marketers measure ROI too quickly? It's often down to internal pressures – to report numbers, to justify tactics, and to secure budget for future digital marketing activity.

It may be due to content production demands – because every campaign introduces a new idea hoping to generate new leads.

It may just be that brand marketers struggle to calculate ROI.



63% of digital marketers don't feel very confident in their ROI measurements today

But not thinking long-term, not measuring ROI properly, leads to lower digital marketer confidence, hesitation to share results and less budget for future campaigns.

**Be measurable**

# Long-term thinking

What's the solution?

Adopt a long-term mindset: define and measure ROI over the whole sales cycle (whatever metric you use). But first learn to understand the differences – and different use cases – for ROI and KPIs.

Then share your results more often.

Educate partners and stakeholders. Show them how to measure. Show them the impact of thought leadership on the bottom line. Show them the effect of an always-on employee engagement strategy. Show them the power of trust. Show them that the brand is standing out from the FinServ noise.

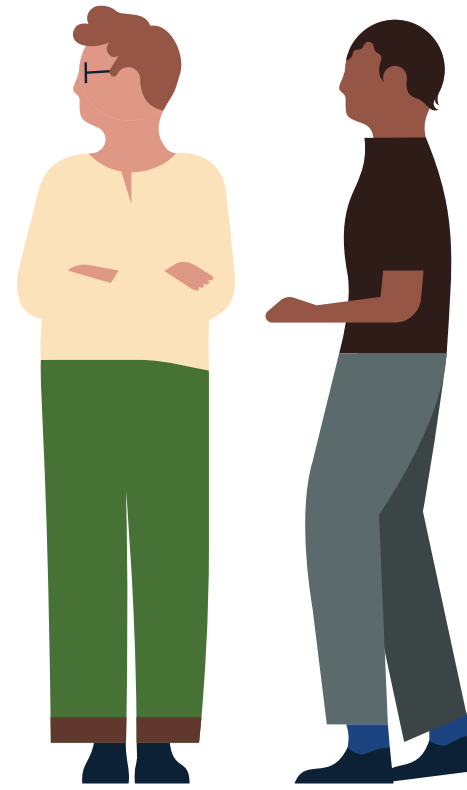


## Be measurable



81%

of FinServ digital marketers measure ROI within one month of a campaign.



46%

But 46% of those marketers had a sales cycle that's 3 months or longer.



4%

And only 4% measure ROI over 6 months or longer.

## Why LinkedIn

# Time to prove ROI

LinkedIn's long-term mindset and ability to gather timely performance data enables marketers to measure, report on, and consistently improve campaign performance with data-driven optimization power.

Once you have the knowledge and the tools to connect the dots between your marketing efforts and those engagements and sales opportunities, any stakeholder apprehension about measuring ROI over the long-term could rapidly change to genuine excitement.

Prove your marketing ROI.

Prove your contribution to pipeline and revenue.

Prove your worth.

It's time to stand out.



## Why LinkedIn

# Proven ROI

LinkedIn's marketing solutions deliver proven return on their investments for the world's leading FinServ brands.

# 55%

of all American Express Australia leads driven by media came from LinkedIn.

With LinkedIn Display Ads, Cetera saw:



13% increase  
in web visits.



27% increase  
in page views.

## Case Study

# MUFG

MUFG wanted to create a unified global brand identity, raise brand awareness and improve engagement with its international audience.

MUFG's first content marketing campaign on LinkedIn ran for a whole six months, which enabled them to measure its ROI effectively.

The campaign was centred on thought leadership pieces on content themes that the brand had identified as key areas of expertise that would be relevant to and resonate with its target audience.

These were delivered to the right audience using LinkedIn's Sponsored Content solution and precise targeting capabilities.

7%

uplift in overall aided brand awareness.

27%

of potential clients engaged.

12%

increase in brand familiarity among HK and Singapore audiences exposed to branded content.

7%

increase in brand familiarity among US audiences exposed to brand content.

# Sources and notes

pg 6: 2019 Edelman-LinkedIn B2B Thought Leadership Impact Study. December 5, 2018.

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pg 8: ibid

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pg 11: LinkedIn internal data

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pg 23: ibid

pg 24: 'Balancing privacy and transparency in a changing world' – Key findings from Private Companies – 21st CEO Survey, PWC. December 2018.

pg 25: Business Insider Intelligence Digital Trust Report 2019. 15 October 2019.

pg 26: LinkedIn internal data

pg 29: 'The Long and Short of ROI: Why Measuring Too Quickly Complicates the ROI Story for Digital Marketers'. LinkedIn Marketing Solutions. Oct 29, 2019.

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pg 31: 'The Long and Short of ROI'

pg 33: ibid

# About LinkedIn

LinkedIn connects the world's professionals to make them more productive and successful. With 675+ million members worldwide, including executives from Fortune 500 companies, LinkedIn is the world's largest professional network.

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