



February 2013

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**Why I'm lucky clients didn't flock to me**

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I reluctantly launched my career as a freelancer after getting laid off from a wonderful investment communications job at an investment management firm. After I decided to freelance, my phone didn't ring with eager prospects. On the other hand, as an introvert, I didn't do much to market myself. Cold calls? Heaven forbid.

So how was this a blessing in disguise? Find out at "[Why I'm lucky clients didn't flock to me.](#)"

Your investment performance reports are failing you

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Sending inadequate performance reports to your firm's clients can hurt your client retention, says Philip Lawton in [Middle Office: Managing Financial Institutions in Turbulent Times.](#)

Continue reading at "[Your investment performance reports are failing you.](#)"

**Marketing tips from referral expert Steve Wershing**

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These lines in Stephen Wershing's [Stop Asking for Referrals](#) caught my eye. I have looked at hundreds of advisor websites, and many of them don't just say the same thing - they use the same words. Make sure that your marketing communicates what's different about your clients and what's unique about what you do for them.

I agree with Wershing about these weaknesses, and I was happy that his book offered advice about how you can differentiate your marketing materials.

Some of Wershing's tips resonated strongly with me.

See the tips at "[Marketing tips from referral expert Steve Wershing.](#)"

Outlook Social Connector: A cool email helper

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Better email communication results from a better understanding of the person with whom you're exchanging messages. It's hard to keep all of the relevant information in your head, or even to collect it in one place. This is why I like Microsoft's [Outlook Social Connector](#), which I learned about in consultant Bill Winterberg's presentation on "Transformative Technology You Can Implement Today" at FPA Experience 2012. While Winterberg highlighted the tool as an aggregator of social media activity, I especially like its email function.

Learn about the email function and more at "[Outlook Social Connector: A cool email helper.](#)"

**Focus your blog post or lose your readers**

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"I'm trying to frame the hawk," said my husband pointing our camera at a spot high above the Cape Cod Rail Trail. He didn't want a teeny-tiny bird image to get lost in a big landscape. His comment made me think about how bloggers need to do something similar.

Continue reading at "[Focus your blog post or lose your readers.](#)"

Blog "out of season" for better value

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Bicycling along the Cape Cod Rail Trail on a Veteran's Day weekend reminded me of the benefits of traveling in the off-season. Similarly, a blogger who posts about topics when they're "out of season" can reap benefits.

Continue reading at "[Blog 'out of season' for better value.](#)"

## Reader poll: What are your blog's goals?

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This month's poll asks "[What are your blog's goals?](#)"

Why do you blog? I'd like to get a better sense of why my readers blog and the obstacles they face. That's the focus of this month's two-question survey.

Talking with students in my [blogging class](#) for financial advisors, I often hear that they'd like to attract more clients. In fact, some of them take the class because they've seen a drop in new business when they've stopped blogging regularly. Those folks seek a way to rediscover their energy for blogging.

Educating people also typically ranks high. Advisors would like to prevent their readers from making mistakes and put them on a path toward better financial futures.

Please answer the two-question survey at "[What are your blog's goals?](#)"

Last month's reader poll: How should advisors use ready-to-use content?

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[Last month's reader poll](#) asked two questions: "Have you ever used ready-to-use content?" and "How should advisors use ready-to-use content?"

Half of the respondents have used ready-to-use content that they license or buy from writers or other providers. The majority felt that advisors should customize the content if they do use it.

Here are the poll results:

- **Question 1: Have you ever used ready-to-use content?**
  - **50% Yes**
  - **33% No, but I'm open to the idea**
  - 17% No
  - 0% Other option
  
- **Question 2: How should advisors use ready-to-use content?**
  - **50% Make extensive edits to the content** (as long as it's legal to do so)
  - **33% Customize the introduction that precedes the ready-to-use content**
  - 17% Use the content without any customization
  - 0% Avoid it like the plague!
  - 0% Other option

Some of the respondents' comments highlighted the advantages of ready-to-use content. For example, one person said, "It's a time saver and often better than what we could produce in-house." Another comment was that content should be customized, especially if it's going to clients.

Thank you, respondents!

**More on writing and marketing**

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- [3 posts that can improve your blogging in 2013](#)
- [Singular or plural—Which is right for \\$5 million?](#)
- [Blog post vs. white paper: How do you decide?](#)
- ["Turn signals" and good writing](#)
- [10 blogs I can't live without-Writer's edition](#)
- [Financial bloggers' posts may violate copyright law](#)
- [Start with a good lead, or lose your reader](#)
- [Plain English can bring your financial topic to life](#)

Where you can find me--online and in person

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**ProfNet #ConnectChat**

At 3 p.m. on March 5, I'll be the featured guest on ProfNet's #ConnectChat Twitter chat moderated by Maria Perez (@ProfNet). I'll be tweeting for journalists who'd like to shift into corporate writing. One cool thing is that my picture will be posted in the Reuters billboard in Times Square as part of the chat promotion.



**"How to Write Investment Commentary People Will Read"**

I will speak to the [CFA Society Hartford](#) on May 2. This is a classic presentation that I've delivered to CFA societies across the U.S. and Canada. The lunch meeting runs from 12 noon to 1:30 p.m. at the Hartford Club. Please register in advance.

**"Writing Emails and Letters People Will Read"**

On May 16 I'll present "Writing Emails and Letters People Will Read" to the [Financial Planning Association of Massachusetts](#). I'll share more details once they're available.

**Mistake Monday**

To improve your proofreading skills, be sure to "like" the [Investment Writing Facebook page](#) and visit on Mistake Mondays. It'll raise your awareness of common mistakes that we

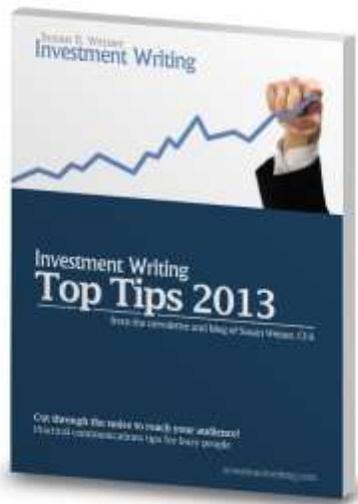
all make. You'll also find links focusing on blogging, writing, and marketing.

**Testimonial**

"Your writing tips continue to prod me to keep sharpening the saw of effective writing. Your resources provide a clear safe haven from the blizzard of information available to us today. Thank you."

**A gift for you: *Investment Writing Top Tips 2013***

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Cut through the noise to reach your audience!

***Investment Writing Top Tips 2013***, a mini e-book full of practical communications and marketing tips, is available at no charge only to my newsletter subscribers.

To obtain your copy, simply **reply to this email and put "Top Tips" in the subject line**. I'll forward a link to this handy reference.

Act now!



Please help me spread the word about this newsletter. Use the "Send to a Colleague" button to forward this newsletter with your personal note to your colleagues whom it would interest.

Your colleagues' information will remain private. I have no way to learn their names or email addresses.

Thank you!

**Quick Links...**

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["How do you ghostwrite my financial article?"](#)

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