

FRAMEWORK

Firm Overview Brochure

kaleido
CREATIVE STUDIO

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Introduction

The firm overview brochure serves as the foundation for all of your branding and messaging. While the idea of a brochure may seem outdated, it has several important uses. Your brochure explains your firm's unique story, and the exercise of creating the brochure can be meaningful to you as a firm. Additionally, you end up with a professional marketing piece you can email or hand out to prospects.

The firm overview brochure is an effective and impactful marketing piece that prospective clients, current clients, centers of influence, and even staff members use to understand your offering, philosophy, and process. The brochure will also serve as an outline for when you begin crafting your website and other marketing communication materials.

This firm overview brochure truly is critical, and you should take the time, spend the energy, and soul-search a bit to find the words and images that set your firm apart.

When to use

1. Email prospects prior to first meeting
2. Hand out to prospects doing introductory meeting
3. Give to centers of influence
4. Provide to recruits or new employees

If you are ready, let's get started!



The Outcome

Everyone wants to know the answer to the question “So what exactly am I creating?” Below is an outline of the sections a firm overview brochure should include.



Cover page

The cover will include not only your firm's logo but also your firm's tagline (if applicable). A “hero” image will be used to either make the connection to your firm's target market or connect with your firm's brand.



Firm introduction

Here, you tell your firm's story and describe your firm's philosophy, and let prospective clients know how your offering serves them. You will use your key messages and key differentiators to describe what potential clients can expect from working with you. If your brochure has a soul, these few paragraphs are it.



Your clients

This section help prospective clients feel that you have expertise in working with people like them. Your images and messaging will describe the clients you work with and help prospects see that they fit within your firm.



Your differences

Using the information you provide in the key differentiators worksheet (see Appendix B), the brochure will showcase your firm's unique qualities. These may range from how you work with a client (e.g., using a team versus one-on-one approach) to the process you take new clients through (five meetings versus three meetings), to the experiences they can expect to receive (such as what it means to work with a fiduciary). There are no right or wrong answers here; these differentiators are simply the things about your firm that make you proud and that you have worked hard to cultivate.



Investment philosophy

As much as clients need to see that they fit in with your firm, they also need to know how you intend to handle their money. In this section, you describe your investment philosophy in a simple and straightforward manner. The important point here is to explain what you do in plain English. Prospective and current clients do not always know the investment jargon.



Firm process

What is it like to go through your firm's process? Should new clients expect three meetings or five meetings in their first year? What will you cover in those meetings? Here, you set expectations and clear up any apprehension by laying out the way you work with your average client. Graphics and text will individualize your process, even if you follow the usual six-step financial planning model.



Firm services

A financial plan can mean many things to many people, especially when you consider the multitude of reasons a prospect may have walked into your office in the first place. As such, put together a clear, easy-to-scan list of the areas you generally cover for clients, such as cash flow and budgeting, investment management, and retirement planning.



The call to action

The last page, usually the back cover, asks prospective clients to reach out and get started. This final page will have all of your firm's contact information. It is also graphically appealing.

The Process

Before jumping into the design, you should begin with some basics. You will need to name your target market, write out your unique value proposition, detail your sales and marketing processes, label your support systems, and decide on a brand identity.

This workbook is designed to take you through this process, step-by-step. Each worksheet will break down a component of what will become the different sections of your firm overview brochure, so please don't rush. Think through each step, and get feedback along the way from staff, colleagues, friends, family, and maybe even a trusted client.

Step 1: Content Development

- 1 Key messages:** These are your firm's talking points. They explain your unique benefits to prospects and clients while ensuring focus and consistency of message. Ideally, key messages are short, easy-to-recall sound bites that everyone in the firm should remember and rely on to describe your firm. (See Appendix A.)
- 2 Key differentiators:** A bit different from a message, these are your selling points. They describe what makes your firm unique in terms of its offering when compared with other financial advisors. When writing these, it is also vital to emphasize the benefit your clients receive from these differentiators. In short, it is not about being better or different; it is about being just right for your target market. (See Appendix B.)

Step 2: Design

- 1 Branding and design questionnaire:** The information you provide here will help direct the visual image of your firm's marketing materials. The more information you provide, the more effectively a designer can design materials to fit you and your firm. (See Appendix C.)

Step 3: Production

- 1 Compliance review:** Send a nearly finalized mock-up of your firm overview brochure to a trusted compliance officer or lawyer. Once you have received their comments, your job is to review the brochure once again, make any final compliance changes, and then put it away for a week or two or pass along to another colleague.
- 2 Editing:** We suggest stepping away from the project or giving it to someone else for this last review because looking at the brochure with fresh eyes is essential in catching any final edits. It can be tough to see necessary fixes when you have already looked at something multiple times. This will be the final round of editing, so help yourself to do the best job you can. Other editing for messaging or images will have taken place during Step 2. Almost done!
- 3 Printing and delivery:** Coordinate professional printing with your preferred printer to get your firm overview brochure printed and delivered to your office.
 - Choose a heavier paper weight.
 - An 8.5 x 11 or slightly smaller size is suggested if you plan to have this brochure accompany other documentation in a professional folder (which should also match your brand).
 - Talk to the printer about how much of the image will bleed.
- 4 Enjoy:** You are done, and congratulations! You have your first professional piece of marketing collateral to share with prospects, clients, and colleagues.

Example

If you are feeling a bit apprehensive about this project, below are a few examples. We want to encourage you to take a look at them, but at the same time, we suggest that you do not necessarily review them as you work through your worksheets.

Allow your work to be unique. We promise there are no wrong answers, and it is always OK, even advised, that you ask friends, family, and colleagues for feedback. It might even surprise you, and hopefully put a smile on your face, to hear the different ways people describe your firm and work.



Appendix A:

Key Messages

Key messages are your firm's talking points. They explain your unique benefits to prospects and clients while ensuring focus and consistency of message. Ideally, key messages are short, easy-to-remember sound bites that everyone in the firm should remember and rely on to describe your firm.

ATTRIBUTES OF KEY MESSAGES

- **Concise.** They consist of one to three sentences in length and are under 30 seconds when spoken.
- **Strategic.** They differentiate you from other firms and state the benefits to the client.
- **Relevant.** They provide a balance between what needs to be communicated with what your audience needs to know.
- **Compelling.** They are meaningful and motivate action.
- **Simple.** They are easy to understand and use conversational language that does not include jargon.
- **Memorable.** They are easy to repeat from memory.
- **Real.** They employ an active voice and are not salesy.
- **Tailored.** They can be slightly altered to effectively communicate to different audiences.

KEY MESSAGES SHOULD

- Describe an organization or service
- Differentiate the organization or service
- Focus on the benefits and state what's in it for the target audience
- Be able to be proven through facts, figures, statistics, and stories

To help develop your key messages, answer these questions:

What do your clients tell you are their greatest needs?

What are the most common situations that prompt someone to contact you?

How do you help your clients most? What are the key benefits you provide?

How do you go about delivering on this help?

What is the one thing you do for clients that your competition couldn't claim the same?

What would your clients tell their friends that you do for them?

What are the three key words or phrases that you want to get across to clients, prospects, and COIs?

Appendix B:

Key Differentiators

Key differentiators are your selling points. They describe what makes your firm unique when compared with other financial advisors that also benefit your client.

To help you brainstorm a list of key differentiators, answer the following questions about your business and how it benefits your clients.

What is your company's origin story?

Why do you do what you do?

What niche markets do you specialize in (e.g., dentists who own their own practice)?

Which areas of expertise or life stage do you specialize in (e.g., retirement income distribution)?

What services do you offer that are unique and differentiate you from an average financial advisory firm?

How is your fee structure different from that of other firms?

How is your investment philosophy different from that of other advisory firms?

What is the size and structure of the business (e.g., national firm, team, solo)?

What unique or specialized education or designations does your staff hold?

How is your service model different from that of other firms (e.g., “We have a service model that grows as a person’s career grows, from their first job to retirement”)?

What unique process ?

What is your reputation in the community?

What is your firm culture (e.g., how do clients feel when they leave your office or work with you)?

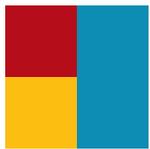
What results do you achieve for your clients that are different from that of other firms?

Appendix C: Branding and Design Questionnaire

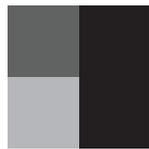
The following branding and design questionnaire will help provide graphic designers with a direction of the visual brand to match your firm's strategy.

COLORS

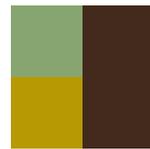
Please rate the following color groups:



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



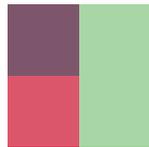
- Hate it
- Dislike it
- Neutral
- Like it
- Love it



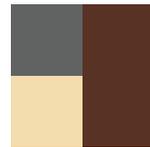
- Hate it
- Dislike it
- Neutral
- Like it
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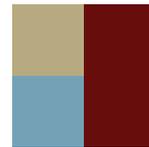
- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it

Comments

COLLATERAL STYLE

Please rate the following brochure covers for style:



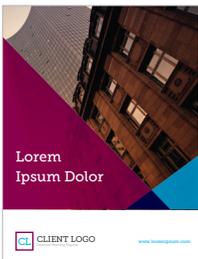
Hate it Dislike it Neutral Like it Love it

Comments



Hate it Dislike it Neutral Like it Love it

Comments



Hate it Dislike it Neutral Like it Love it

Comments



Hate it Dislike it Neutral Like it Love it

Comments



Hate it Dislike it Neutral Like it Love it

Comments

STOCK PHOTO STYLE

Please rate the following photos:



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



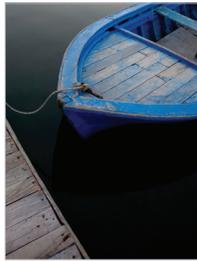
- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



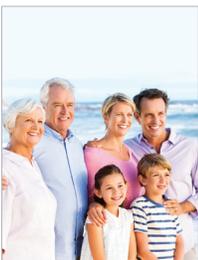
- Hate it
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- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
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- Neutral
- Like it
- Love it

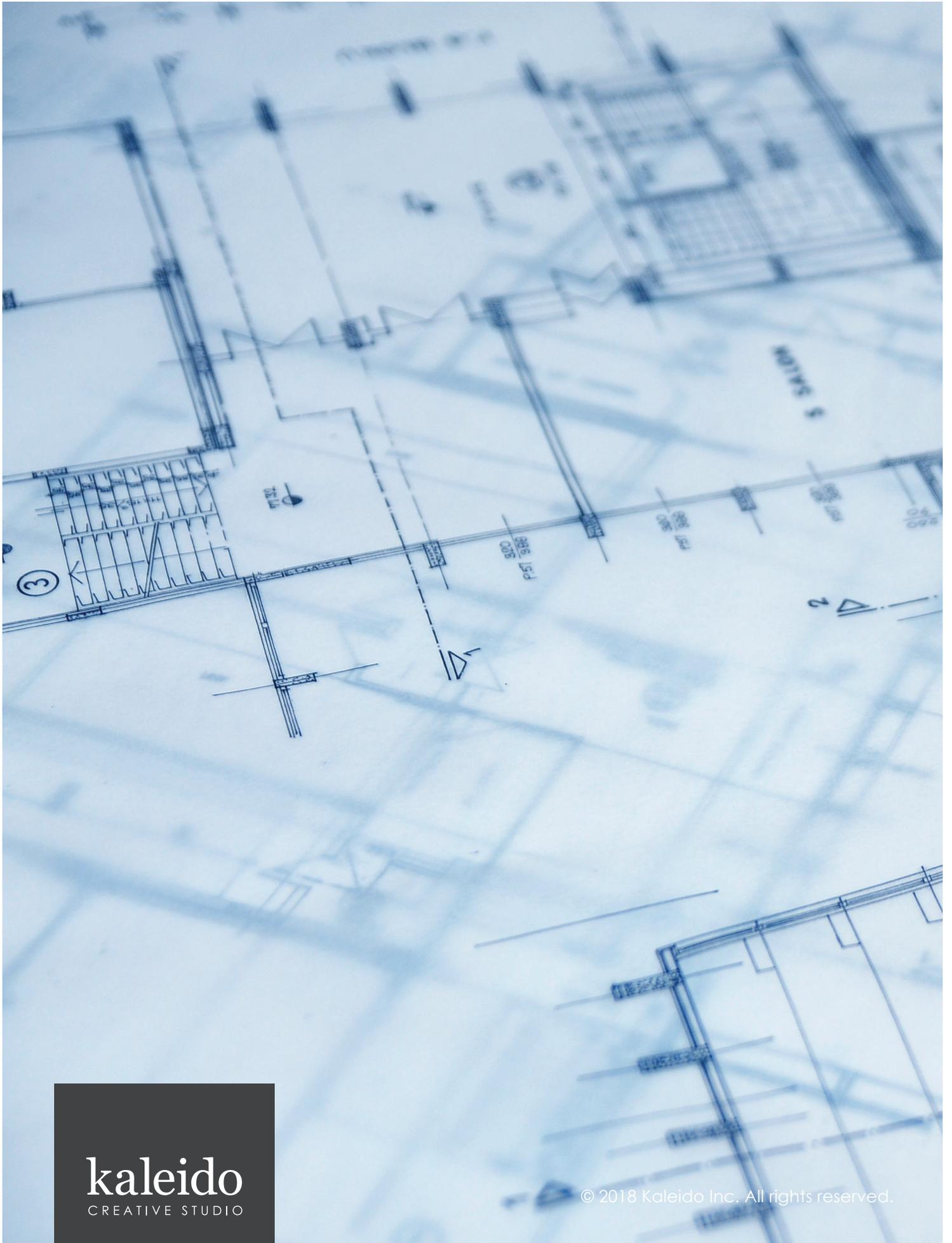


- Hate it
- Dislike it
- Neutral
- Like it
- Love it



- Hate it
- Dislike it
- Neutral
- Like it
- Love it

Comments



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