

The Financial Advisor's Digital Audit Checklist

Website

Your website is your most valuable online asset. It serves as the introduction to your business and it's typically how clients and prospects find you online. Making a good first impression, as we all know, is one of the most important aspects of building a strong relationship with your clients as well as converting prospects into customers.

You can hire a firm to perform this arduous task but there are also a variety of free tools to help you. Read on for resources to get you started while not being overwhelmed by terms like meta, alt, title tags, and PageSpeed.

Meta Tags

Meta tags make it easier for search engines to determine what your content is about, meaning they directly impact your SEO.

Meta tags are placed in the <head> section of an HTML document, so they need to be coded in your Content Management System (CMS). If your website is hosted by WordPress or similar web-hosting platforms, you can add these tags manually. If not, contact your IT Department or Webmaster to add these tags.

Alt Tags

An alt tag, also known as "alt attribute" and "alt description," is an HTML text description used for images that impact your SEO. Alt tags also help if images don't display properly and assist when search engines and other robots cannot interpret images. This text also helps screen-reading tools describe images to visually impaired readers and allows search engines to better crawl and rank your website.

For more information on how alt tags affect your website rankings [click here](#).

Title Tags

The contents of a page title are very important for search engine optimization (SEO) as they affect your search result rankings by summarizing the page content area. A title tag includes specific page content on your website, ex: company.com/history. Including relevant keywords and phrases can only help your rankings.

To learn more about optimizing alt and titles - read this article from yoast.com.

Page Speed

A slow website can actually affect your Google search rankings if it takes too long to load. Per a recent Kissmetrics infographic, if a page takes longer than 3 seconds to load, over a quarter of users will click away and choose a different search result. Page speed has been an important metric according to Google. As far back as 2010, Google announced that page speed would be included as one of the ranking factors for their search index.

Google offers a free service, PageSpeed Insights - [click here](#). You can also receive custom suggestions on how to optimize your site - [click here](#). SEMRUSH also offers a free site audit (with certain limitations) - [test it out here](#).

Tip: if you decide to work with an SEO consultant or an audit service, make sure they ask you questions about your business objectives, goals, and customer demographics/personas before you enlist their services. If not, they may not be the best partner for you.

Content

Content is one of the most important marketing tools you can utilize. This will help your organic SEO (meaning non-paid marketing) and increase your search results based on keywords. HubSpot has created a comprehensive guide on [How to Run a Content Audit](#), including what types of content, how to use keywords in your content, and the importance of using different channels to share content.

SEO (Search Engine Optimization)

Search engines such as Google and Bing use “bots” to crawl pages on the web, going from site to site, gathering information about those pages, and putting them in an index. Algorithms analyze pages in the index, to determine where your pages will appear in search results. Therefore, adding frequency to your content posting, like regular blog posts to your site will help maximize where you show up in search results.

Search engines give preference to websites that meet their basic “checklist” - meaning: your website content should be accurate, easy to access, and user-friendly.

[Here is a great resource](#) from [localseochecklist.com](#) with 30 simple tips to boost your local SEO.

Social Media

You should have a posting strategy for your social media. This is accomplished by analyzing the best-performing posts by content, date, and time using clicks, reactions, comments, shares, etc. Using these insights you can tailor your posts by the best-performing content.

Posting every day can be an overwhelming task, especially depending on how many platforms you have. You can save time by scheduling posts across all your networks by using a Social Media Management System/Platform.

Learn more about the best social media management tools from [techradar.com](#) - click here. [View the list here](#) for deals, and reasons to buy and avoid per platform.

Digital Advertising

Digital advertising is a key aspect of any marketing plan. People increasingly use digital devices and online ordering instead of shopping at brick-and-mortar shops. Your online presence is important to tell your brand story and reach larger targeted audiences. You can personalize your ads based on prospect behaviors, demographics, level of engagement, product, and more.

Social media platforms are constantly changing their advertising image sizes. If you are working with a designer or creating them yourself, not having the proper size will delay your ad from being deployed and/or being rejected. [Here is a helpful 1-page guide](#) from HubSpot with standard social media image specifications.

If you can't afford a professional graphic designer one helpful tool is Canva. Canva offers platform-specific templates to easily create digital ads and post directly to your social platforms.

Email Marketing

You may have heard that email marketing is dead. But it remains one of the most impactful marketing strategies. Among marketing channels, email marketing yields the highest return on investment (ROI) for the past 10 years.

Open and click-through rates are great data to analyze. According to a MailChimp Email Benchmark Report, the average email open rate for all industries is 21.33%. According to the same report, the average click rate for all industries is 2.62%.

MailChimp offers tips for improving your email marketing including subject line testing, audience segmentation, and more. [Read more here.](#)

Email Service Providers

Make sure to do your research before signing up for an email service provider. They may have restrictions on how many subscribers you have or the number of emails you can send. Lesson: do your research before subscribing to email service providers.

For more information on the best email marketing software, PCMag.com compiled its list of [The Best Email Marketing Software for 2022.](#)

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