### asset+map

# 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

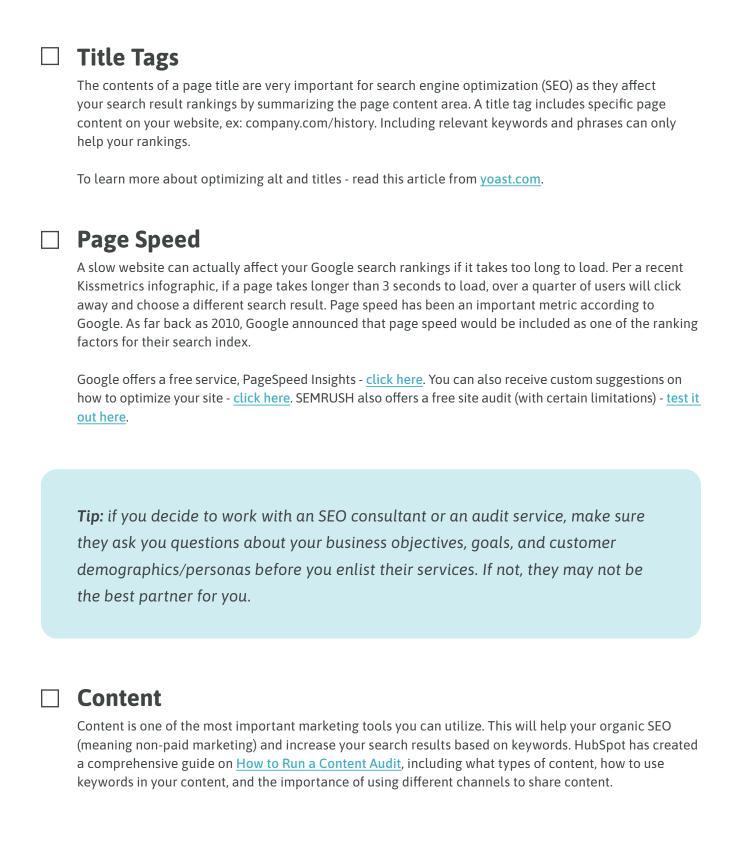
Meta tags make it easier for search engines to determine what your content is about, meaning they directly impact your SEO.

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.



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. <u>View the list here</u> 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.

## You may have heard that ema strategies. Among 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 <u>The Best</u> Email Marketing Software for 2022.

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