

OneFamily Adviser

Lead generation

Lead generation is used to generate interest in your service or products for the purpose of developing a sales pipeline.

It is often implemented through digital channels such as direct marketing and social media.



Two of the most popular tools are e-mail marketing and Facebook advertising.

These platforms are

**cost
effective**

and can get your message to a target audience,

with the ability to

**measure
your
success**

against your campaign.



Direct marketing

Direct marketing enables you to make direct contact with existing or potential customers to promote your products or services.

Unlike media advertising, it allows you to target particular people with a personalised message. Ideal for small businesses, it is a cost effective and powerful tool to generate sales.



Steps to e-mail marketing

1. What is the purpose of your campaign? Ask yourself the following questions

- What is your message?
- Do you want to promote your service, a particular product or create brand awareness?
- What do your audience want?
- What do you want your audience to do?

2. Who do you want to target?

The first step is to look at who you want to target and contact. This could be new leads in a specific region, or customers of a certain age. You can then compile your mailing list. Make sure the recipients on your mailing list have given you permission to send them marketing or sales material. If you are buying a mailing list, ask the seller if you have permission to send marketing material.

3. What do you want to say? Where do you want to direct them?

- The more targeted you can be the better. Segment your list so you are delivering the relevant message.
- Ensure your subject line is enticing, so the recipient wants to read on
- The content should be concise, brief and engaging. Most people read emails in less than 10 seconds, so make sure the most important information goes at the top of the email
- Integrate call-to-actions. A call to action is the place you want to direct your audience to, this could be your website or your phone number. Most importantly at the top of the email so readers can be directed to your website or where you want to direct them easily

4. Design and generate your email using an email platform.

You can design, send and measure your email through several email marketing platforms including Dotmailer, Emarsys or MailChimp.

You must ensure your emails are responsive (available on all devices such as mobile phones and tablets), more and more people use their phones to check emails so the email must render correctly in their view.

5. Comply with email marketing regulations

When creating your email, remember to include an opt out option. It is regulatory that you give your customers the ability to opt out. For example – see image below.

For more information visit the Information Commissioners Office (ICO) website <https://ico.org.uk/for-organisations/marketing/>

Unsubscribes

You must always include an unsubscribe link in your email. It doesn't need to be prominent but does need to be included. It offers people the chance to request no more email communications from you and also it helps you manage your lists, keeping them clean and also protects your reputation as an email sender.



6. Test your email

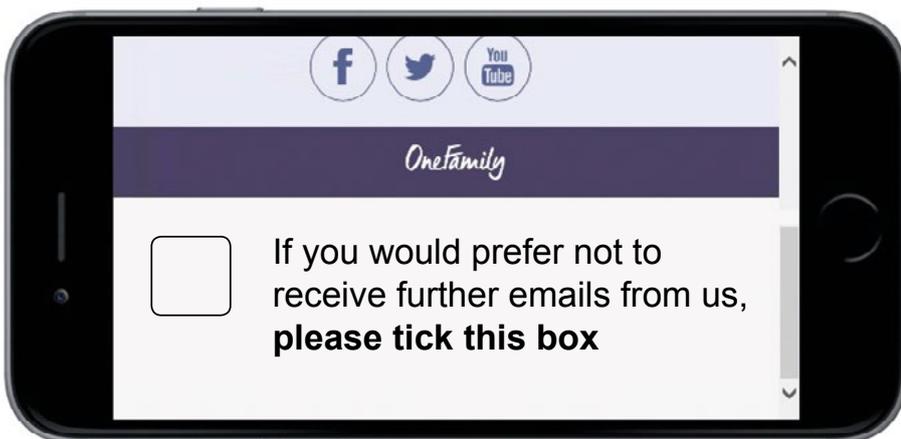
You can do this using your email platform, sending it to colleagues internally. Click on the links to ensure they're working properly. Have fresh eyes proofread the copy. Always check how your emails render in different email clients and on devices, i phone, I pad etc.

7. Send your email

When sending the final message, include internal colleagues, in order to thoroughly check how well the message is getting through.

8. Evaluate email and customer journey

With your email platform you can track your emails journey by measuring who interacted with your communication. You can track opens, clicks, click throughs, bounces, unsubscribes and revenue generated.



Facebook advertising in a nutshell

Marketing on Facebook is a powerful and efficient way to increase sales for your online business. It's an effective way to reach the people who matter to your brand and in turn tracks the results of your advertising across different devices.



Increase people's awareness of your brand or business

Facebook offers a number of ways to reach your audience through targeted advertising. Here are a few steps and tips to each type of ad they offer.

Facebook offer a few different ways to increase brand awareness including;

1. Select your campaign option:

- Boost your posts
- Increase your page likes by promoting your page
- Reach people in your local area
- Send people to your website
- Collect leads for your business
- Increase conversation on your website

2. Setup your Facebook ad

Once you have selected your campaign type, you can then setup your ad using the following steps:

- **Target your audience** - you can create a custom list with your existing customer base or select a new audience based on their location, age gender and even language
- **Placement of ad** - you can target your ad/audience? on different devices such as their mobile or desk top news feed and even through Instagram, the popular photo and video sharing app owned by Facebook
- **Budget & Schedule** - define how much you would like to spend, through a daily or a lifetime budget (long term). You can also select the days you would like your ads to run and schedule a time of the day they run at (for lifetime budgets)

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3. Design your Facebook ad

You can design your ad, depending on the type of campaign you have created.

The example on the right shows a **page promotion**.

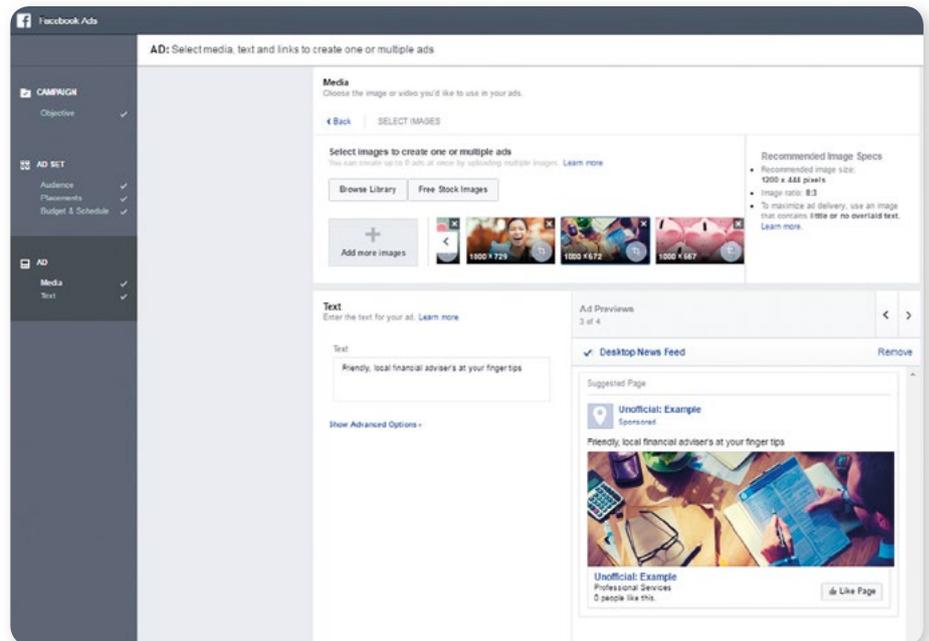
Here, you are able to edit the image your audience will see for the ad. Facebook offer a sample of stock images, but you may have your own photography or logo you would like to use. You can also preview how your audience will view the ad on their desktop newsfeed and mobile newsfeed.

The second example on the right shows a **generating leads** ad. You can design your ad with images, videos or a slideshow with accompanying text. These types of ads include a 'call to action' such as the option to sign up, subscribe or learn more.

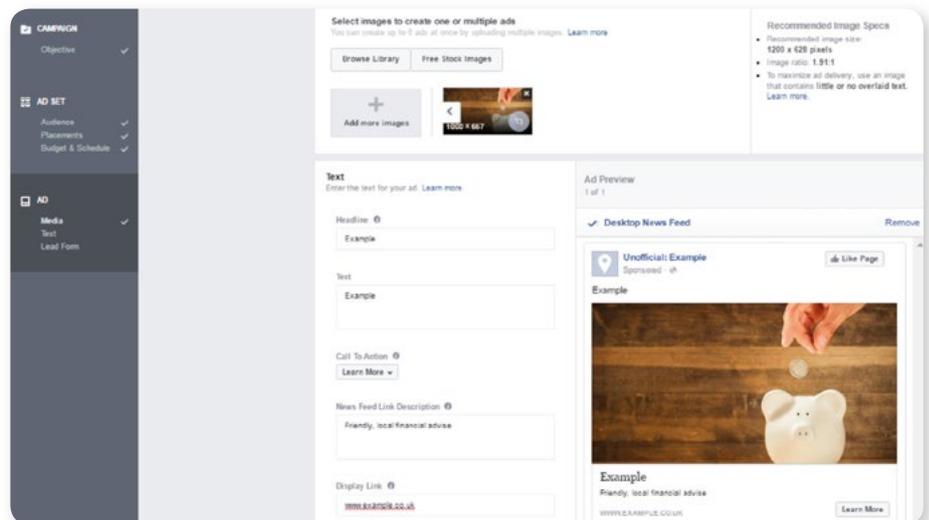
This option then leads your audience to a form, where they fill out a few short questions. You can design your form in the ad design section.

The forms are then available for you to download.

Page promotion



Generating leads



Measurement

By selecting 'Ads Manager' you are able to view your ads and their progress. You can view the results and the reach of each ad to see how successful they were.

You should keep track of your ads and measure their successes to track:

- What content worked well
- If less or more works better

- If an image worked better than a video or slideshow
- Who was the most responsive, based on
 - Location
 - Gender
 - Age group

For more information on other social media channels, please see our 'How to create a buzz through social media' guide.

In summary



Lead generation tools

are the most cost effective way to get your message to a target audience quickly.

Direct your audience

straight to your target web page through Email marketing.



Boost your brand awareness

with the range of Facebook advertisement offers.

Please remember

all marketing material should be fair, clear and not misleading, in order to comply with the Financial Conduct Authority requirements and ensure you continue to treat customers fairly. If you want to know more, just visit www.fca.org.uk/firms

