



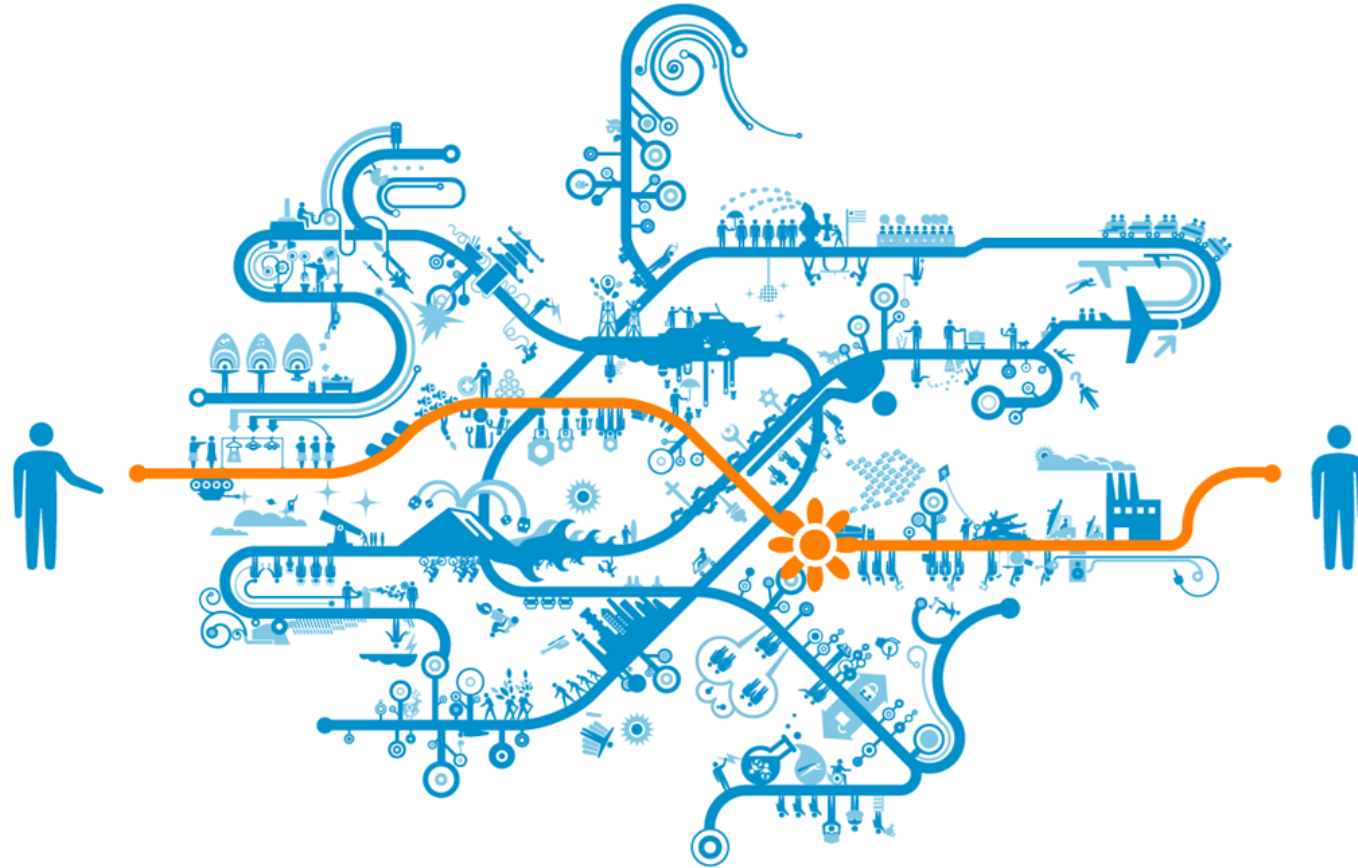
Sparking a Great Content Conversation

(IN A REGULATED ENVIRONMENT)


Breaking Through Was Easier



Today's Challenge



| It All Begins With Content



Content is the only true
way of reaching, engaging
and converting audiences.

Period.

| Worst. Case Study. Ever.

“The opinions expressed in this video are not necessarily those of the participants.”

It Seemed Like a Good Idea at the Time

A major U.S. bank wanted to hold a webinar on a media site's homepage. Three of its small-business clients would discuss what drove them to become entrepreneurs.

A bank VP would take part, but with a small role, while an independent journalist would moderate.

The webinar would be carved up into short videos that could be used by the bank and the media site as content.

The 'Entangled' Problem

- The bank's direct participation meant it was the bank's message
- ALL participant statements would need compliance approval
- Given that media was involved, this was deemed unethical

The 'Adoption' Problem

- The bank's sponsorship of its clients message was a problem
- The bank's sponsorship of the site environment was a problem
- Compliance wanted approval of all communications

Then Came the Disclaimers...

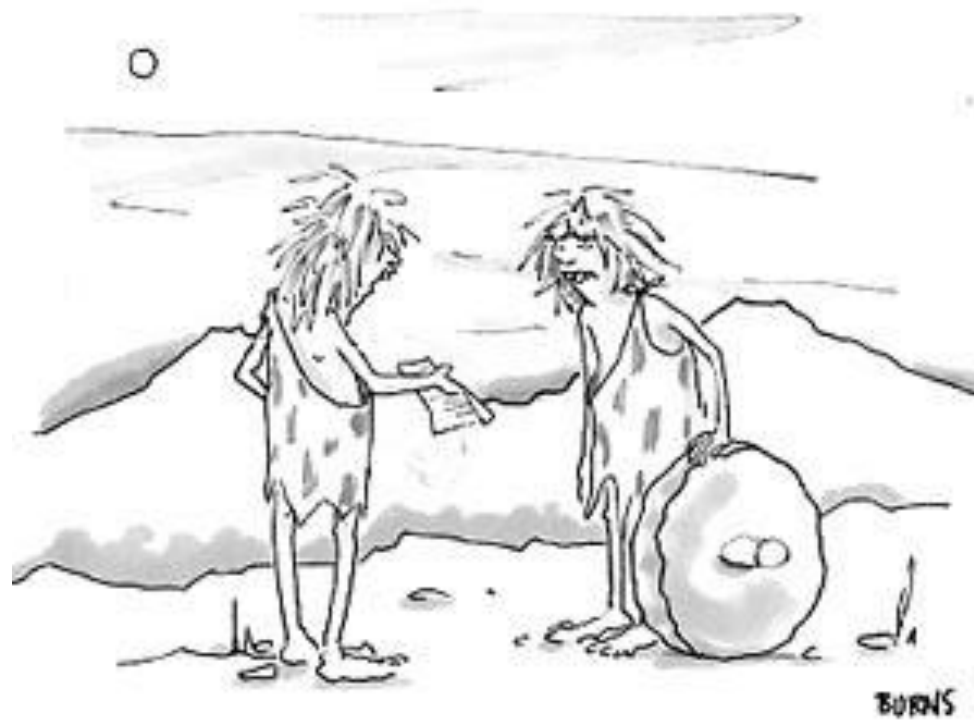
- “The opinions expressed in this video are not necessarily those of [BANK NAME].”
- “The opinions expressed in this video are not necessarily those of the bank.”
- “The opinions expressed in this video are not necessarily those of the participants.”
- “The opinions expressed in this video are those of the participants.”



Content is **NOT** the problem for financial services companies

You **DON'T** have to reinvent the wheel

But...



“Oh yeah?! Well, I just invented regulations for the wheel!”

| Why Content Is Vital

What Can Content Achieve?

- Content builds communities
- Content is a force for discovery
- Content is a currency
- Content leads to conversion

The Three Kinds of Content

THEMATIC

DISCOVERY

CONVERSION

Why Good Content Resonates


- It's Authentic
- It's True
- It Causes Audience to Seek Change and Advice

Three-Pronged Content Strategy

CREATE/CURATE

INFUSE

ENGAGE



It's the 'engage' part that
gets firms into trouble.

| The Challenge of Engagement

Regulators LOVE Social Media, Like...



Most Recent Guidance on Social Media

SEC: January 4, 2012

FINRA: August 2011

Use Social, But Use It Wisely

- Is an Outside Link ‘Adoption?’
- Is an Outside Link ‘Entangled?’
- Is a ‘Like’ a ‘Testimonial?’

| Five Final Thoughts



Be Where Your Audience Is

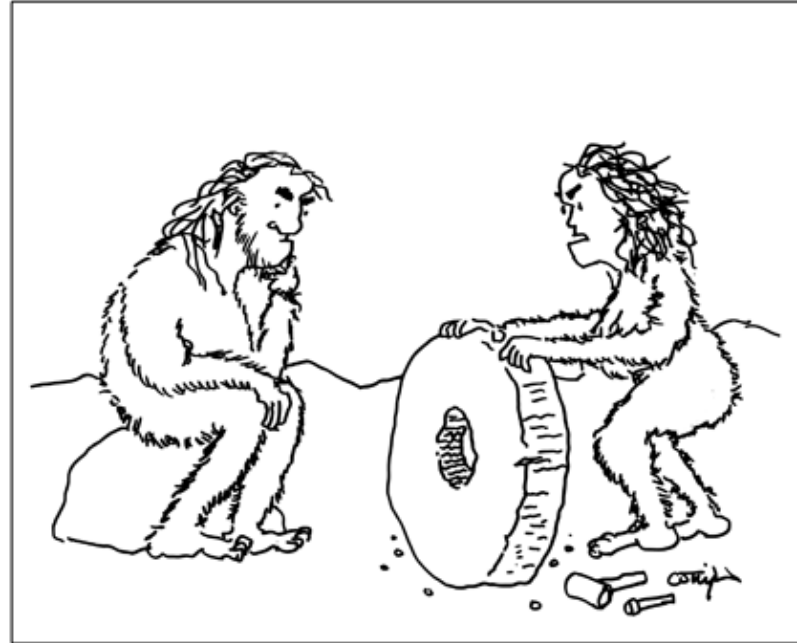


Engage Compliance Early



Let Metrics Be Your Guide

NOISE TO SIGNAL
Rob Cottingham



For the last time, no, I do not know
what the ROI is on it!

Remember Your Goal: Conversion



| *Thank You!*