

## Your Step-By-Step Guide To Taking Your Business Digital



Do you have the right moves when it comes to integrating digital marketing into your business? It's been shown that Investment Advisors who communicate with clients electronically are the most successful - they have the most clients, assets and revenue.

This guide shows you how to embrace the power of online media to empower your marketing efforts and showcases the tools you have available at your fingertips. By following six easy steps, you'll be clicking like a pro in no time. And best of all, you'll open up your business to new possibilities.

Get Cyber Savvy In Six Easy Steps:

[Step 1: Build Your Own Website](#)

[Step 2: Promote Your Website](#)

[Step 3: E-mail Marketing](#)

[Step 4: Online Client Messaging](#)

[Step 5: Enrol Clients In CIBC Wood Gundy Online](#)

[Step 6: Integrated Marketing](#)

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For technical support, please call Client Relations at 1 (866) 271-9393.

## Step 1: Build Your Own Website

### Why?

The first step in going digital with your business is to build your own website - your virtual storefront on the Internet. Publishing a website enables you to:

- Promote your business on the Internet, 24 hours a day, seven days a week
- Become your clients' portal to CIBC Wood Gundy Online
- Begin a dialogue to enhance or initiate client relationships

### How?

Building your own website is a snap with the IA Website Builder. With this online interactive tool you can create your own professional website in a few simple steps. With the IA Website Builder you can:

- Customize content for clients and prospects
- Highlight your unique value proposition and expertise
- Build English and French sites

### Get Started

- [IA Website Builder](#)
- [IA Website Builder resources](#)
- [Anatomy of an IA website](#)
- [Tailoring your website](#)
- [Before building](#)
- [Build a great website](#)
- [Best practices](#)
- [Personal Profile Tips | French](#)
- [Personal Profile Templates | French](#)

[Index](#) [Step 2 >>](#)

## Step 2: Promote Your Website

### Why?

Once you've built your site, it only makes sense you implement Internet resources to:

- Increase exposure for your business
- Generate traffic to your site
- Make it easier for clients to find you
- Use a cost-effective means of promoting your business

### How?

Getting the word out about your website via the Internet can be done in many ways, including:

- Personalizing your website address to [www.firstnamelastname.com](http://www.firstnamelastname.com) or [www.teamname.com](http://www.teamname.com)
- Registering your website address with a registration service
- Listing on other approved websites
- Announcing your website through popular search engines
- Advertising on local websites that link back to your site
- Including your digital co-ordinates on business cards, letters, e-mail signatures and other materials

### Get Started

- [Register your website address](#)
- [List on other websites](#)
- [Announce your website](#)
- [Online advertising](#)
- [Request online ads](#)
- [Promote digital co-ordinates](#)

[<< Step 1](#) [Index](#) [Step 3 >>](#)

## Step 3: E-mail Marketing

### Why?

E-mail allows you to keep in touch with your clients and qualified prospects. It's also a great way to deliver valuable information about your services that can help convert prospects into clients. E-mail marketing is:

- Simple and cost-effective for regular communications
- Easy for clients and prospects to forward your e-mail to their contacts - word of mouth marketing is one of the most effective ways to gain referrals
- Effective to keep your clients current on marketplace activity to answer questions before they arise

### How?

Almost anything you can do with a letter, you can do with an e-mail. In all cases, you should invite clients and prospects to sign up to receive your e-mail. Remember that e-mail should never be used to relay trading information or to update personal client information. Effective ways to make your e-mail marketing more professional are:

- E-mail stationery: Give your e-mails a professional look
- ViewPoint: Create your own customized newsletter in PDF format.

### Get Started

- [E-mail marketing](#)
- [E-mail best practices](#)
- [Anatomy of an e-mail](#)
- [E-mail compliance](#)
- [Netiquette and e-mail tips](#)
- [ViewPoint](#)

[<< Step 2](#) [Index](#) [Step 4 >>](#)

## Step 4: Online Client Messaging

### Why?

Online Client Messaging is an online interactive tool that permits you to create targeted messages for your clients that will be displayed to them through CIBC Wood Gundy Online. Online Client Messaging allows you to:

- Stay connected with your clients
- Put one to one into practice by targeting your message to specific clients
- Reach your clients when they are online and focused on their investments

### How?

Online Client Messaging is intended for general messages rather than investment recommendations. It's easy to use and includes these features:

- Client targeting: Select the recipients of your messages based on various criteria
- Mail to feature: Include a link that allows your clients to e-mail a response to your message
- Bilingual: Create messages in English and/or French
- Best practices: Tips and guidelines to help you create great messages

### Get Started

- [Log into Online Client Messaging](#)
- [Online Client Messaging Resources](#)
- [Overview of Online Client Messaging](#)
- [What is Online Client Messaging?](#)
- [Getting help with Online Client Messaging](#)

[<< Step 3](#) [Index](#) [Step 5 >>](#)

## Step 5: Enrol Clients In CIBC Wood Gundy Online

### Why?

For affluent investors, online access to accounts is a must. Smart Investment Advisors understand the significance of the Internet to their clients and also benefit from:

- Increased client trust
- Enhanced client relationships
- Added value delivered to clients

### How?

CIBC Wood Gundy Online is a robust Internet service that you can feel proud to offer to your clients. With your own website, you can become your clients' portal to all of the features of CIBC Wood Gundy Online including:

- Access around the clock and around the world
- Timely account information
- Respected research covering hundreds of companies worldwide spanning an array of investments
- Single access point to fast changing market data

### Get Started

- [Visit cibcwoodgundy.com](#)
- [CIBC Wood Gundy Online marketing materials](#)

[<< Step 4](#) [Index](#) [Step 6 >>](#)

## Step 6: Integrated Marketing

### Why?

To gain the maximum benefit from digital marketing, it's important to integrate digital means into your regular marketing efforts. Digital marketing is not meant to replace your current marketing initiatives, but rather to enhance them. With integrated marketing, you can:

- Reinforce your digital presence
- Initiate alternative modes of contact
- Communicate your ability to respond to clients' digital needs

### How?

Some ways you can incorporate digital media include:

- Client event: Include website and e-mail address on invitations, offer option to RSVP by e-mail
- Seminar: Post a synopsis on your website, remind attendees of seminar by e-mail
- Website address: Include in all your outgoing communications including letters, faxes, business cards, ads
- Fulfilment vehicle: Post material you would normally provide by more traditional means to your website

### Get Started

- [More integrated marketing ideas](#)

[<< Step 5](#) [Index](#)