

Content Marketing Capabilities & Insights

Building a Content Center of Excellence

Meet the Team



James Meyers

SVP & Managing
Director, Content Mkt.



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Account Supervisor



Cyndee Miller

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Financial Services



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Content Strategist



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VP, Creative Director



Brendan Turner

SVP, Digital
Experience



Matt Binz

Sr. Director, MarTech and
Applied Intelligence



Pete Baughman

Senior Director, Media



Lisa Chatroop

Senior Content
Director, Financial Services



Kim Stotlar

Senior Account Manager



Kevin Quinn

SEO Strategist

And an experienced financial services team of writers, editors, fact checkers, copy editors, designers, digital developers and more.

Agenda

1. What We Heard
2. About MX
3. Our Approach to Content
4. Initial Thoughts
5. Next Steps

What We Heard

Current State

Today, all LPL content is distributed, not measured, and there is limited focus on value-add, thought leadership content.

Goal

Create a content Center of Excellence that helps cultivate relationships with key audiences to reframe their perception of LPL Financial.

Primary Audiences:

Independent Financial Advisors and Heads of Wealth + C-Suite Execs at Financial Institutions

Secondary Audience:

Individual Investors

Support Needs

You're looking for a partner who understands financial services and has an eye for disruptive and impactful content.

Your team needs support with all aspects of a content program: strategy, execution, distribution and measurement.

2nd Largest

Independent
US B2B Agency



B2B Marketing

Agency of the
Year 2022

2nd Fastest Growing

US B2B Agency

BEST AND
BRIGHTEST
COMPANIES
TO WORK FOR
IN THE NATION
WINNER 2023

4th Largest Overall

US B2B Agency



CMI Content Marketing
Agency of the Year

Agency Centers of Excellence



Brand



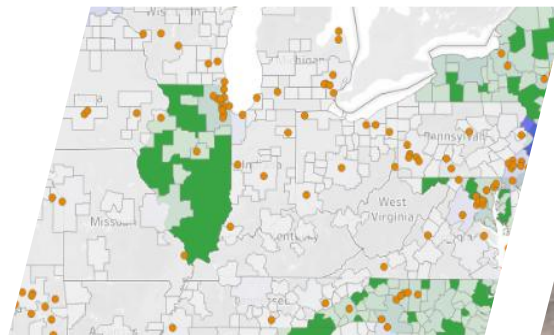
Content Marketing



Loyalty



Digital
Experience



Demand



Media



ABX

Leading Content Marketing for 30 Years

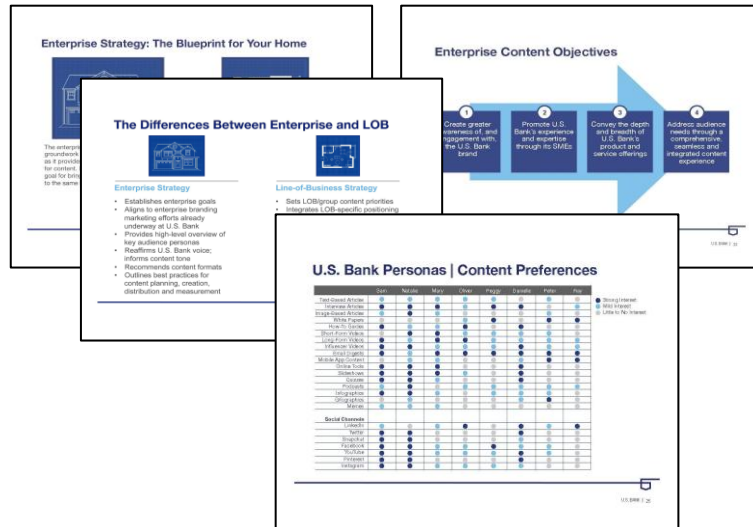
- Recognized leader in integrated, strategic content programs for financial services, trade association and B2B clients
- Over 100 industry excellence awards in the past 10 years
- Content Marketing Institute Content Marketing Agency of the Year
- Top 10 Global Creative Content Agency (3x)
- Merged with MX in October 2022

Deep Financial Services Expertise



Financial Services Content Portfolio

Content Strategy



Podcasts



Thought Leadership Index™

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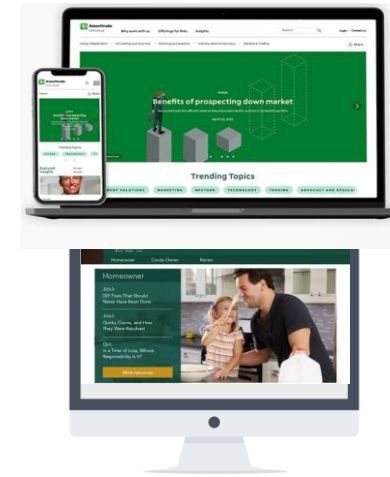
Print Magazines



Case Studies



Digital Features



Infographics



Videos



Quizzes



eBooks



Social Storytelling



Our Approach

Strategy-Led Execution

Audience-First Focus

**Content
Center of
Excellence**

**Omnichannel,
Atomized Delivery**

**Data-Driven
Content Decisions**

In Action: Strategy-Led Execution

4

Lines of Business
Reviewed

700

Content Pieces
Analyzed

70+

Stakeholder
Interviews Conducted

12

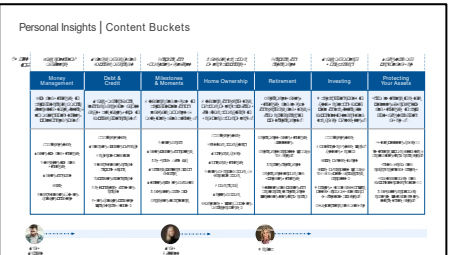
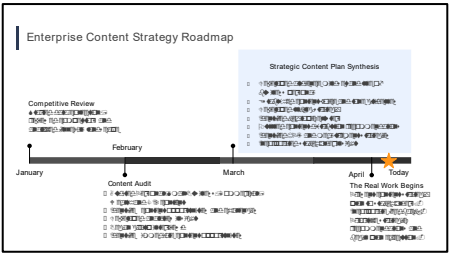
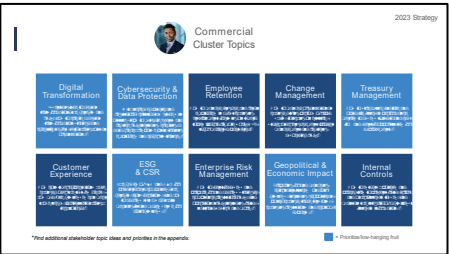
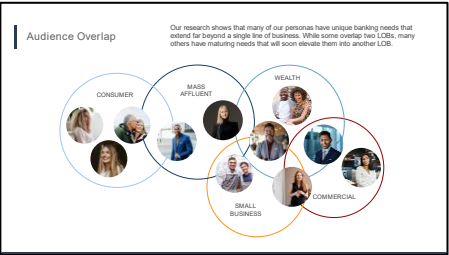
Audience Personas
Developed

11

Competitor Content
Programs Audited

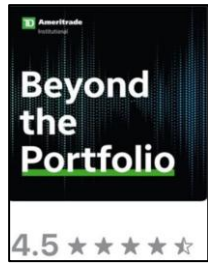
170

Pages in Strategy Playbook Delivered



In Action: Audience-First Focus

Podcast



Custom Illustrations



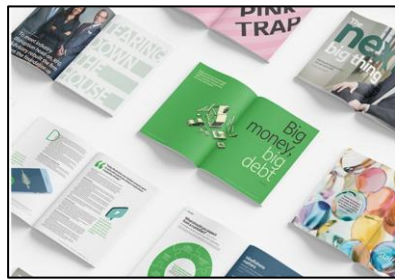
Digital Content Hub



Event Support



Print Magazines



SEO Research

<p>STRENGTHS:</p> <ul style="list-style-type: none"> Organic traffic is distributed across ranking content pieces - organic traffic to the hub comes from ~80 content pieces (vs 3-5 for competitors) Providing EAT of content creator - author credibility and publication date for most content pieces Strong foundation for mobile optimization - only product competitor investing in AMP <p>OPPORTUNITIES:</p> <ul style="list-style-type: none"> Rich Snippets / Structured data - our competitors have little to no real estate on high volume SERP features for non-branded keywords Ranking for mobile + voice - ~90% of competitors' keywords are ranking on desktop vs mobile Optimizing content for keyword clusters - Competitor's individual content pieces are only ranking for 3-5 keywords each 	<p>WEAKNESS:</p> <ul style="list-style-type: none"> Technical infrastructure - currently there are 43 critical errors impacting ranking potential Internal linking structure - though articles have related content suggestions, there's little to no internal linking within body copy Limited content types ranking in search - articles represent the majority of ranking content on the hub <p>THREATS:</p> <ul style="list-style-type: none"> Keyword cannibalization - branded competition from other TDA affiliated sites Competitors with high DA - product competitors inheriting high authority from parent domains Paid search competition for non-branded informational queries - all product competitors are running SEM ads targeting high-volume highly competitive queries
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Paid Media



Research Reports



Interactive Infographics



Quizzes & Worksheets



Social



Videos



In Action: Omnichannel, Atomized Delivery

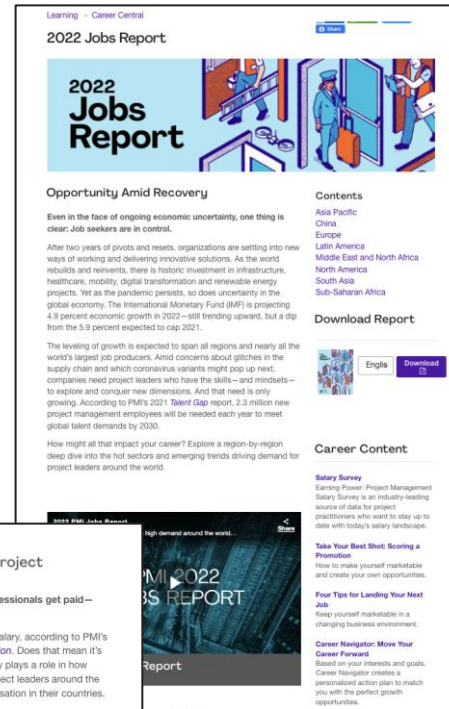
Special Report



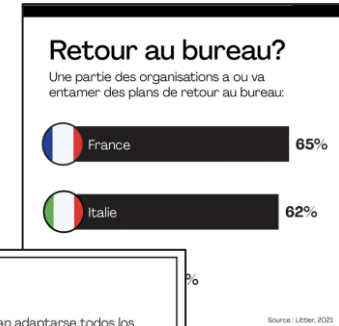
Custom Illustration



Online Content



Social Storytelling



Video



Salary Survey Snapshot
What's Driving the Earning Power for Project Managers?

Location matters when it comes to how much project professionals get paid—but it's not the only factor.

Project professionals in Switzerland earn the highest median salary, according to PMI's *Earning Power: Project Management Salary Survey—12th Edition*. Does that mean it's time to pack your bags? Not so fast. Your home base definitely plays a role in how much you're paid, but there are other factors. PMI went to project leaders around the world for their insights on the trends and traits driving compensation in their countries.

Switzerland
Median salary: US\$140,983

Rewarding a Diverse Skillset

Financial services and pharmaceutical sectors are usually offering the highest salaries to project managers in Switzerland. Those industries are frequently facing change and disruption, which demands higher resilience and flexibility from project management professionals. That trend, and the increasing need for business agility, will require a more diverse skillset. And that skillset cannot be limited anymore to traditional project management competencies. It will span strategic thinking, innovation and sound business acumen, while having a good grasp of technological trends. Diversity of skills driven by increasingly complex and uncertain business environments will be a differentiator for salaries.

—Marcus Glowasz, PMI-ACP, PMP, PgMP, program manager, UBS, Zurich

Podcast

With guest Elton Soares and Malong Dong | 23 February 2022 | [Transcript](#)

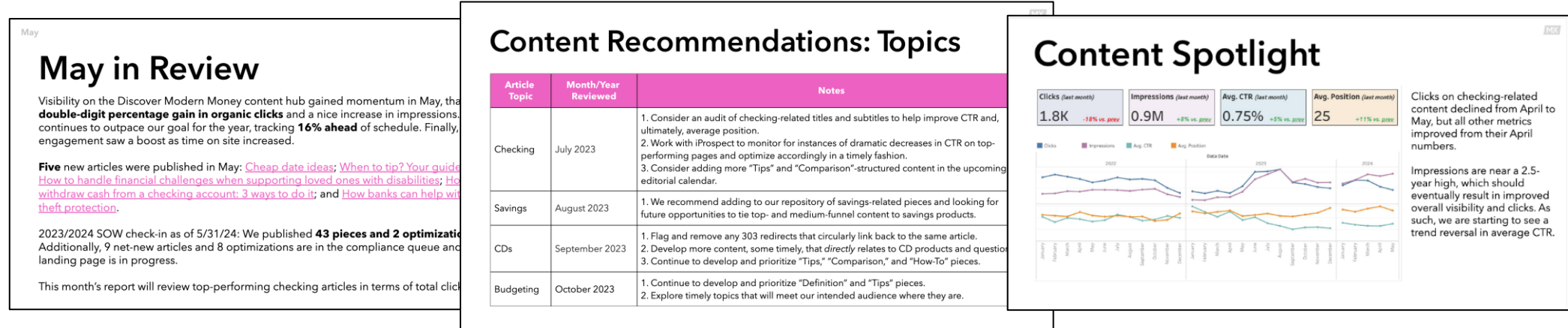
2022 Jobs Outlook for Project Leaders

Even with disruption and economic uncertainty, the job market for project talent is booming—and it doesn't look to be slowing down anytime soon. Guests discuss how the changing world of work has brought new opportunities—and new demands—for project professionals.

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In Action: Data-Driven Content Decisions



+67%

Average Monthly Organic Impressions

+98%

Average Monthly Organic Conversions

+34%

Average Keyword Ranking

Since program inception

Initial Thoughts

Go deeper on education.

LPL is publishing lots of content in a variety of formats, but much of it is quick-hitting.

The Opp: Complement shorter pieces with long-form content that goes deeper on topics and delivers enhanced value to advisors—while boosting SEO.

And #Share It on social.

You've built up an audience—and you're iterating with popular formats like carousels and video to drive engagement.

The Opp: Use those platforms to share your educational content and lean into social storytelling.

Make it easier to engage.

People spend more time on your site than on competitors' websites and view more pages per visit.

The Opp: Create a more user-friendly experience. Put the focus on developing more powerful visuals and simplified navigation for content to bring in (and engage) new audiences.

Stake your claim as a thought leader.

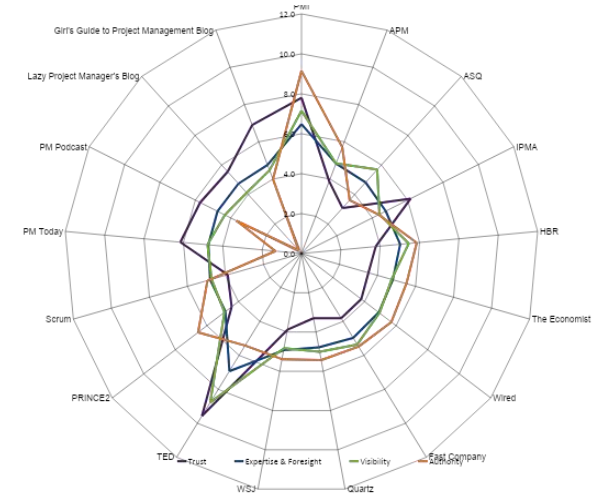
The finserv landscape is full of content—and is only getting more crowded with the rise of AI.

The Opp: Become an industry disrupter. Identify your big rocks and lead the conversation with content that provides a strong POV.

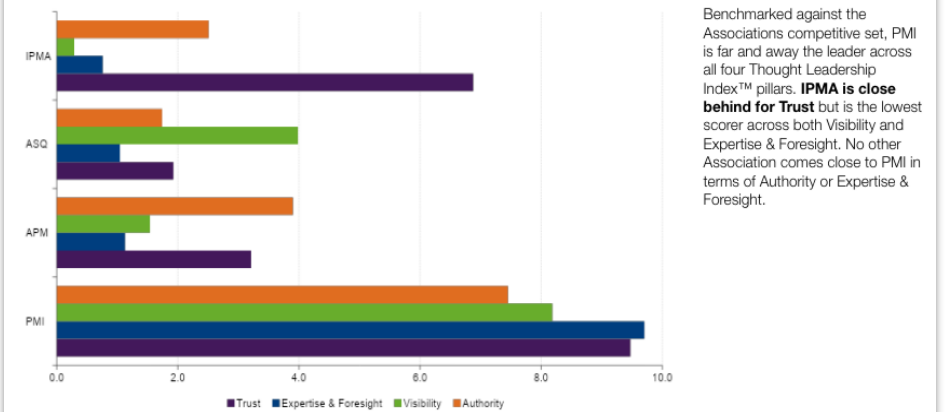
Thought Leadership Index™

Proof that you are a thought leader.

WEIGHT			RELEVANCE FILTER	30%	20%	30%	20%
	COMPETITIVE SETS			Trust	Expertise & Foresight	Authority	Visibility
40%	Associations	PMI IPMA APM ASQ	↓	12%	8%		
10%	Publishers	HBR Economist Wired Fast Company Quartz WSJ TED		3%	2%	3%	2%
30%	Certifications	PRINCE2 Scrum Alliance		9%	6%	9%	6%
20%	Smaller Players	PM Today PM Podcast Lazy Project Manager's Blog Girl's Guide to Project Management		6%	4%	6%	4%



Competitive Set: Associations



Developed in consultation with:



SPIEGEL
RESEARCH
CENTER

Let's keep the
conversation
going!

Next steps

B2B Like It Oughta Be.