

# Content Marketing Capabilities & Insights

*Building a Content Center of Excellence*

# Meet the Team

**James Meyers**

SVP & Managing  
Director, Content Mkt.

**Karen DeBellis**

Account Supervisor

**Cyndee Miller**

VP, Executive Director  
of Content

**Beth Gaston**

Senior Content Director,  
Financial Services

**Laura Marzec**

Content Strategist

**Tiffany Toft**

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



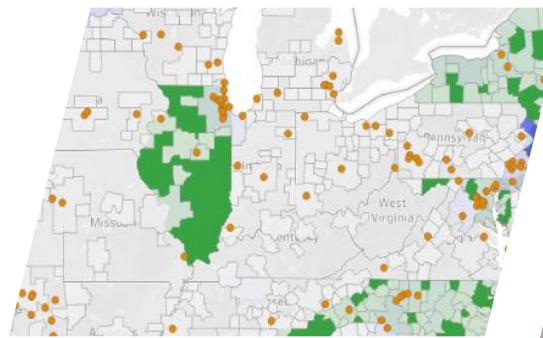
Content Marketing



Loyalty



Digital Experience



Demand



Media



ABX

# Leading Content Marketing for 30 Years

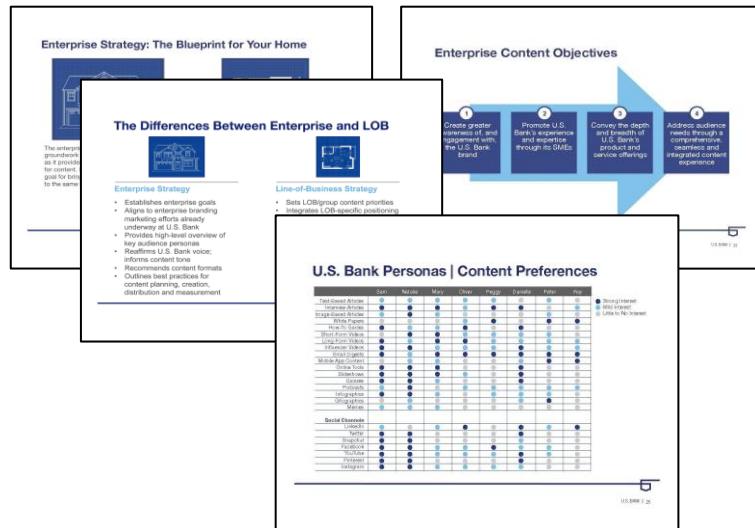
- Recognized leader in integrated, strategic content programs for financial services, trade association and B2B clients
- Over 100 industry excellence awards in the past 10 years
- Content Marketing Institute Content Marketing Agency of the Year
- Top 10 Global Creative Content Agency (3x)
- Merged with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

# Deep Financial Services Expertise



# Financial Services Content Portfolio

## Content Strategy



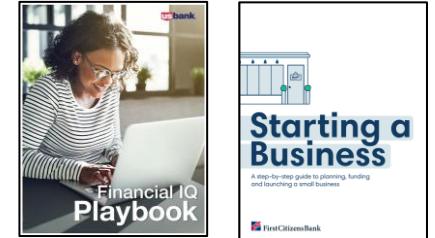
## Print Magazines



## Digital Features



## eBooks



## Podcasts



## Thought Leadership Index™

WEIGHT	COMPETITIVE SETS	RELEVANCE FILTER	30%	20%	50%	20%
			Trust	Expertise & Forecast	Authority	Visibility
40%	Associations		12%	8%	12%	8%
10%	Publishers		3%	2%	3%	2%
30%	Certifications		9%	6%	9%	6%
20%	Smaller Players		6%	4%	6%	4%

## Case Studies



## Infographics



## Videos



## Quizzes



## 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

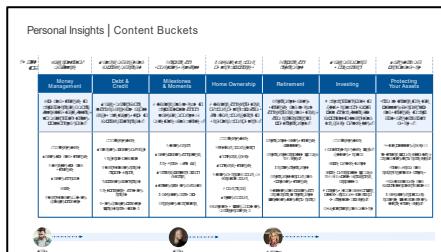
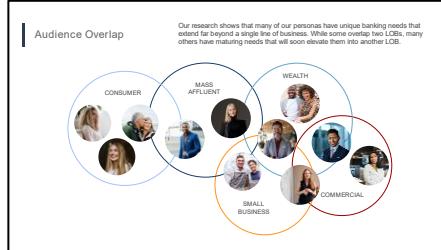
Audience Personas  
Developed

11

Competitor Content  
Programs Audited

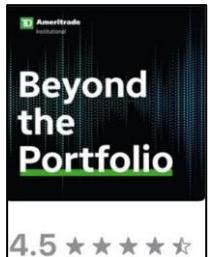
170

Pages in Strategy Playbook Delivered



# In Action: Audience-First Focus

Podcast



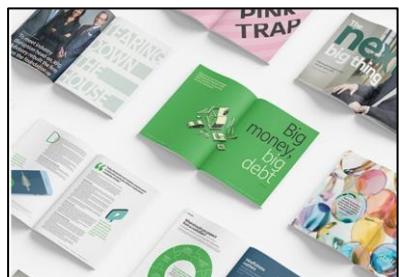
Custom Illustrations



Digital Content Hub



Print Magazines



Event Support



Quizzes &amp; Worksheets



Social



Paid Media



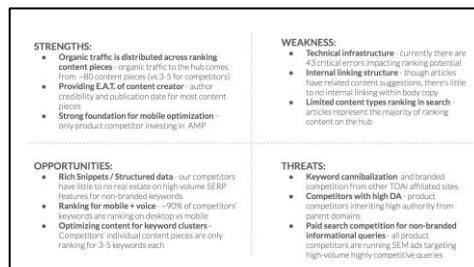
Research Reports



Videos



SEO Research



Interactive Infographics



# In Action: Omnichannel, Atomized Delivery

## Special Report



## Custom Illustration



## Video



## Online Content

**2022 Jobs Report**

**Opportunity Amid Recovery**

Even in the face of ongoing economic uncertainty, one thing is clear: Job seekers are in control.

After two years of pivots and resets, organizations are setting into new ways of working and delivering innovative solutions. As the world rebuilds and reinvents, there is historic investment in infrastructure, healthcare, energy, digital transformation, and renewable energy projects. Yet as the pandemic persists, so does uncertainty in the global economy. The International Monetary Fund (IMF) is projecting 4.9 percent economic growth in 2022—still trending upward, but a dip from the 5.9 percent expected to cap 2021.

The leveling of growth is expected to span all regions and nearly all the world's largest job producers. Amid concerns about glitches in the supply chain and which coronavirus variants might pop up next, companies need project leaders who have the skills—and mindset—to explore opportunities and dimensions. And that need is only growing. According to PMI's 2021 Talent Gap report, 2.3 million new project management employees will be needed each year to meet global talent demands by 2030.

How might all that impact your career? Explore a region-by-region deep dive into the hot sectors and emerging trends driving demand for project leaders around the world.

[Download Report](#)

## 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.

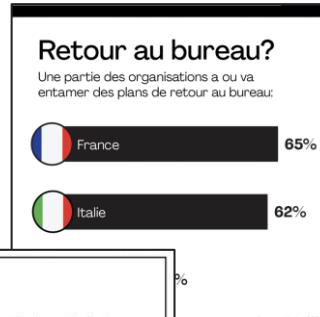
—Marcus Glowasz, PMP, PgMP, program manager, UBS, Zurich

## Social Storytelling

**2022 Jobs Report**

**“There’s a huge demand for experienced, skillful project managers.”**

—Tanisha Adams, PMP, Georgia Department of Public Health



## 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.

Subscribe for free: [Alexa](#) | [Apple Podcast](#) | [Google Podcasts](#) | [Soundcloud](#) | [Stitcher](#)

▶ 0:00 / 0:00

# In Action: Data-Driven Content Decisions

**May**

## May in Review

Visibility on the Discover Modern Money content hub gained momentum in May, with a double-digit percentage gain in organic clicks and a nice increase in impressions. This continues to outpace our goal for the year, tracking 16% ahead of schedule. Finally, engagement saw a boost as time on site increased.

Five new articles were published in May: [Cheap date ideas](#); [When to tip? Your guide](#); [How to handle financial challenges when supporting loved ones with disabilities](#); [How to withdraw cash from a checking account: 3 ways to do it](#); and [How banks can help with theft protection](#).

2023/2024 SOW check-in as of 5/31/24: We published **43 pieces and 2 optimizations**. Additionally, 9 net-new articles and 8 optimizations are in the compliance queue and the landing page is in progress.

This month's report will review top-performing checking articles in terms of total click-through rate.

## Content Recommendations: Topics

Article Topic	Month/Year Reviewed	Notes
Checking	July 2023	<ul style="list-style-type: none"> <li>1. Consider an audit of checking-related titles and subtitles to help improve CTR and, ultimately, average position.</li> <li>2. Work with iProspect to monitor for instances of dramatic decreases in CTR on top-performing pages and optimize accordingly in a timely fashion.</li> <li>3. Consider adding more "Tips" and "Comparison"-structured content in the upcoming editorial calendar.</li> </ul>
Savings	August 2023	<ul style="list-style-type: none"> <li>1. We recommend adding to our repository of savings-related pieces and looking for future opportunities to tie top- and medium-funnel content to savings products.</li> </ul>
CDs	September 2023	<ul style="list-style-type: none"> <li>1. Flag and remove any 303 redirects that circularly link back to the same article.</li> <li>2. Develop more content, some timely, that directly relates to CD products and questions.</li> <li>3. Continue to develop and prioritize "Tips," "Comparison," and "How-To" pieces.</li> </ul>
Budgeting	October 2023	<ul style="list-style-type: none"> <li>1. Continue to develop and prioritize "Definition" and "Tips" pieces.</li> <li>2. Explore timely topics that will meet our intended audience where they are.</li> </ul>

**Content Spotlight**

Clicks (last month) 1.8K -18% vs. prev Impressions (last month) 0.9M +8% vs. prev Avg. CTR (last month) 0.75% +5% vs. prev Avg. Position (last month) 25 +1% vs. prev



Clicks on checking-related content declined from April to May, but all other metrics improved from their April numbers.

Impressions are near a 2.5-year high, which should eventually result in improved overall visibility and clicks. As such, we are starting to see a trend reversal in average CTR.

# +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.

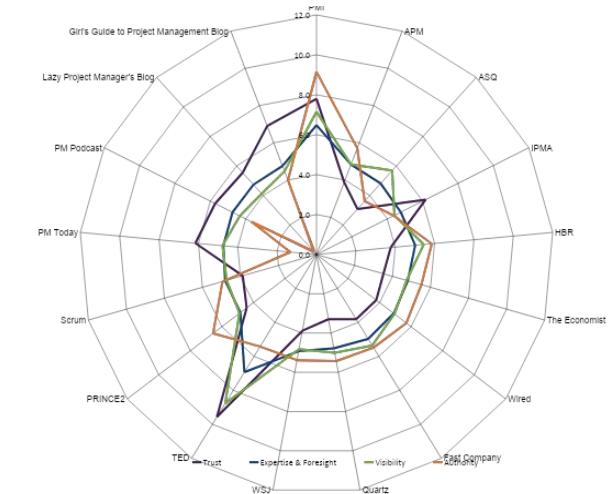
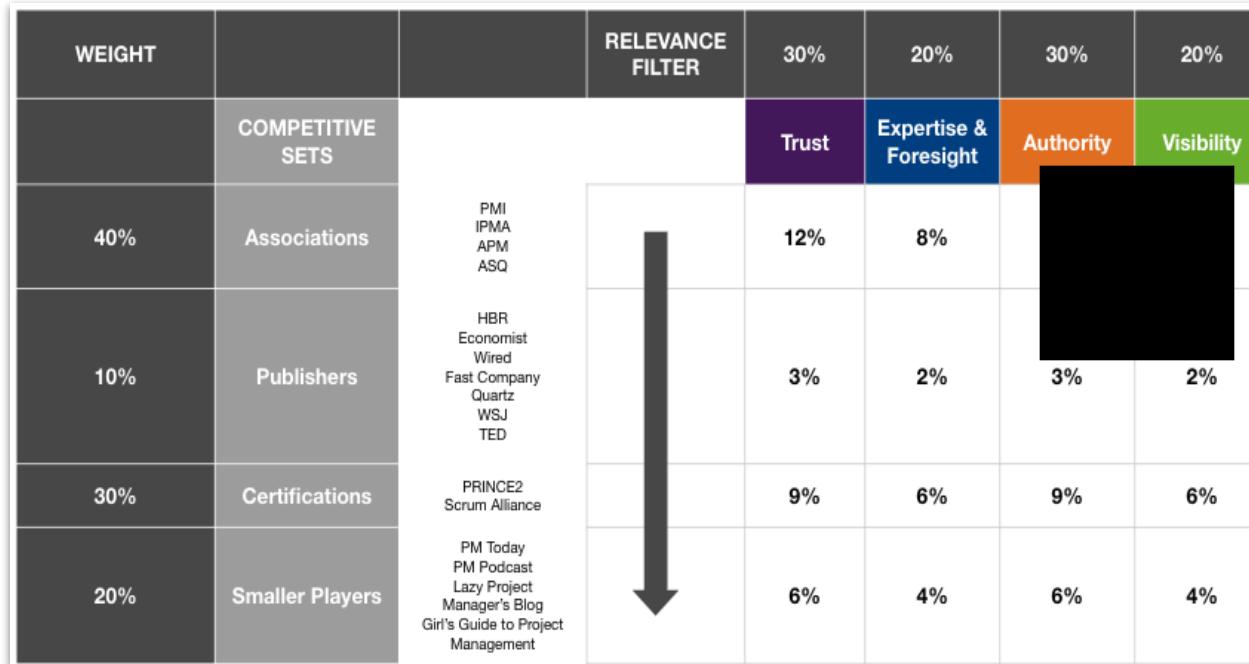
# Stake your claim as a thought leader.

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

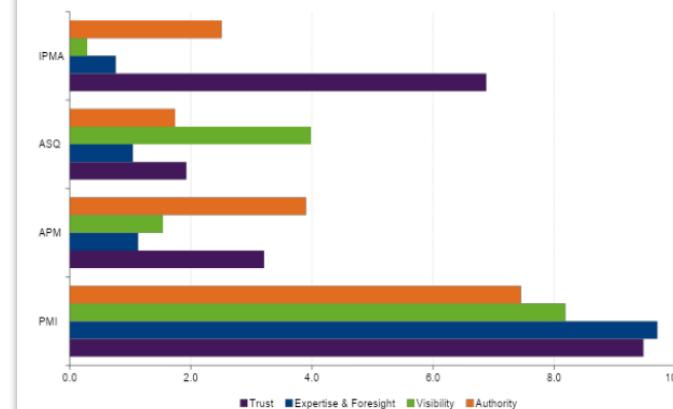
**The Opp:** Become an industry disrupter. Identify your big rocks and lead the conversation with content that provides a strong POV.

# Thought Leadership Index™

*Proof that you are a thought leader.*



## Competitive Set: Associations



Benchmarked against the Associations competitive set, PMI is far and away the leader across all four Thought Leadership Index™ pillars. **IPMA is close behind for Trust** but is the lowest scorer across both Visibility and Expertise & Foresight. No other Association comes close to PMI in terms of Authority or Expertise & Foresight.

Developed in  
consultation  
with:



SPIEGEL  
RESEARCH  
CENTER

Let's keep the  
conversation  
going!

# Next steps

B2B Like It Oughta Be.