



MAKE

Learjet Turns 50; Luxury Living at Disney World; Why Tech is Beating Wall Street

GROW

How Foundations Can Earn a Profit; Investing in the Caspian Sea; Fishing for Science

LIVE

Self-Defense for 2014; Top 10 Influential Art Galleries; Wine's New Power Brokers

CURATOR

Eight Super Fast Sedans and Sports Cars; Surprising Whiskies from Japan; New Classics from Burger Boat

Worth[®]

THE EVOLUTION OF FINANCIAL INTELLIGENCE



100

P

THE 100 MOST
POWERFUL PEOPLE
IN FINANCE

WORTH.COM

26

VOLUME 22 | EDITION 05



Sterling Investment Advisors Ltd.

Timothy E. Flatley, ChFC®, President

“What do I need to know about the new age of marketing?”

By Timothy E. Flatley

How do you get the message of your business out to potential clients?

Many business owners continue to market and brand the way they always have—using print, radio, TV and direct mail. But today’s consumers and their interests are evolving more rapidly than the marketing strategies of most businesses.

To dive more deeply into this topic, we turned to Lance Hollander, managing partner of Delphic Digital, a digital and branding agency (www.delphicdigital.com). Hollander has helped plan and manage complex online initiatives for some of the biggest brands today, including Martha Stewart Living Omnimedia, AT&T, Oakley, Callaway Golf Co., Mitsubishi Group and the nonprofits the American Lung Association and the New York Public Library.

According to Hollander, the technology has changed so much in the last few years that companies that need to target their message can do so with a new set of online tools and software. The real challenge is where to begin and how to make room in their current budgets without risking their current sales pipeline. Hollander says that the first thing businesses need is a website with enough traffic from potential customers to allow the owner to start a conversation. If you don’t have sufficient traffic, you can

buy it via Google, social sites and display or email list rentals.

Hollander adds that when you think about the shift of dollars from offline to online, you should keep in mind the time it takes to optimize and turn a positive ROI. Buying online is easy but doing it correctly is not, which can lead a business owner to abandon the strategy too soon.

The good news about online marketing is the constant stream of data it offers, telling you how you are doing. Hollander goes on to say that offline tactics are often measured by phone calls or a sale, while online has much more data to measure. For instance, not only can you see how many times your ad was shown, clicked and then converted, you can also dig into a second level of data.

You can actually see how many times potential customers came to your site, how long they stayed and which messages made them convert. He says that when building an online campaign, it’s great to get the immediate sale, but you should keep in mind that all you really need to do is “start a conversation.”

With just a single visit to your site, then, you’ve broken through a barrier. The customer now knows who you are, allowing for a targeted communication. Certainly a sale is great, but getting an email address moves

you to the next level of communication. Building an email database will ultimately provide you the best long-term ROI by offering the opportunity for targeted communication with prospects, which can be done frequently for mere pennies.

Talking to prospective customers is more effective online than ever because as you learn more about them, you can segment and customize your messages via lead nurturing software. Software companies like HubSpot, Marketo and Pardot combine your communications from email, social media and even your landing pages. If used correctly, these messages can achieve your goal like a well-orchestrated symphony, by tracking and by customizing what you want to say.

In short, you should start a conversation with a click and keep the conversation going with a message that you test, optimize and re-test. Offline tactics are still good for some things, but don’t let old-school thinking keep you and your business in the dark.

As investment advisors, we at Sterling try to keep ahead of the curve of the marketing paradigm. As branding and marketing evolves, there will be winners and losers, and our goal is to find investable companies poised to take advantage of these trends. ☺



Timothy E. Flatley, ChFC®
President

Sterling Investment Advisors Ltd.
1055 Westlakes Drive, Suite 150
Berwyn, PA 19312
Tel. 610.560.0400 | 877.430.7382

flatleyt@sterling-advisors.com
www.sterling-advisors.com

REPRINTED FROM

Worth
THE EVOLUTION OF FINANCIAL INTELLIGENCE

Sterling Investment Advisors Ltd. is featured in *Worth*® 2013 Leading Wealth Advisors™, a special section in every edition of *Worth*® magazine. All persons and firms appearing in this section have completed questionnaires, have been vetted by an advisory group following submission by *Worth*®, and thereafter paid the standard fees to *Worth*® to be featured in this section. The information contained herein is for informational purposes, and although the list of advisors presented in this section is drawn from sources believed to be reliable and independently reviewed, the accuracy or completeness of this information is not guaranteed. No person or firm listed in this section should be construed as an endorsement by *Worth*®, and *Worth*® will not be responsible for the performance, acts or omissions of any such advisor. It should not be assumed that the past performance of any advisors featured in this special section will equal or be an indicator of future performance. *Worth*®, a Sandow Media publication, is a financial publisher and does not recommend or endorse investment, legal or tax advisors, investment strategies or particular investments. Those seeking specific investment advice should consider a qualified and licensed investment professional. *Worth*® is a registered trademark of Sandow Media LLC. See "About Us" for additional program details at <http://www.worth.com/index.php/about-worth>.