



9 WAYS TO BUILD AUTHORITY, TRUST, & CREDIBILITY ONLINE

CHECKLIST: The ATC (Authority, Trust, & Credibility) Checklist - How do Plan Sponsors See You Online?



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Welcome!

You'll find your free checklist on the next page which gives you 9 ways to build authority, trust, and credibility online. I hope you like it and of course, find it useful.

Like you, I know the challenges of trying to grow a 401k business, differentiate yourself, and manage all that's required to run a compliant practice.

The last 20+ years in this business have taught me a lot and I'm happy to share with you what I've learned.

I want you to be successful. And if I can shorten the learning curve for you and get you to your goals faster, then I know that I've been successful too.

Let me know if you have any questions,

Sharon
HERE TO YOUR SUCCESS,
OWNER, 401KBESTPRACTICES.COM

CHECKLIST

Building Authority, Trust, & Credibility Online

This checklist is designed to help you understand and identify the things you can do to build authority, trust, and credibility **online**. Try to incorporate as many as you can as you build your online presence.

AUTHORITY

Credentials – Do you list and explain any specialized training that you’ve completed?



Recognition or Awards – Have you or your team/firm received any awards or been nominated for industry recognition – and is that posted online for people to see?



Education – Do you post educational articles to your blog or LinkedIn profile or do you offer/publish any regular webinars or workshops for plan sponsors?



TRUST

Professional Appearance – Do you have a consistent brand, professional image, photos that are NOT stock images, a clean logo, etc. on your website and across all your online profiles?



Authentic – Is the content on your website written in the first person? Does it read like you would talk in conversation? Do you use plain English and easy to understand language vs. industry jargon? Does your personality come through?



Client List or Logos – Do you have a representative list of your 401k clients on your website?



CREDIBILITY

Case Studies – Do you list any case studies or scenarios of how you’ve helped your clients address specific challenges?



Specific Statistics and Examples – In your blog posts and articles, do you cite specific regulations, case law, or studies to reinforce the points you are making?



Include your “Why” – Can prospects easily understand your “why”? What is the reason you’re in the 401k business? Why do you feel the services you offer are important?



- If you’re unable to check off at least 4 items above, it’ll be tough for plan sponsors to trust that you’re qualified to help them with their 401k plan, based on your online presence.
- Once you complete at least 5 items, then you start to look a lot like other financial advisors competing for 401k business, but plan sponsors still don’t really know if you’re a true 401k specialist.
- The sweet spot is once you get at last 7 items checked off, then you pull ahead of your competition and it becomes much easier for plan sponsors to know, like, and trust you as a true 401k specialist.

7 WAYS TO GET INSTANT AUTHORITY

I recently created a training video titled "7 Ways to Get Instant Authority" and thought it would benefit you since you downloaded this checklist.

It's free to access (no opt-in required).

Just click the link below the image and it should open in a new window for you.

Enjoy!



**CLICK HERE TO ACCESS
THE FREE TRAINING**