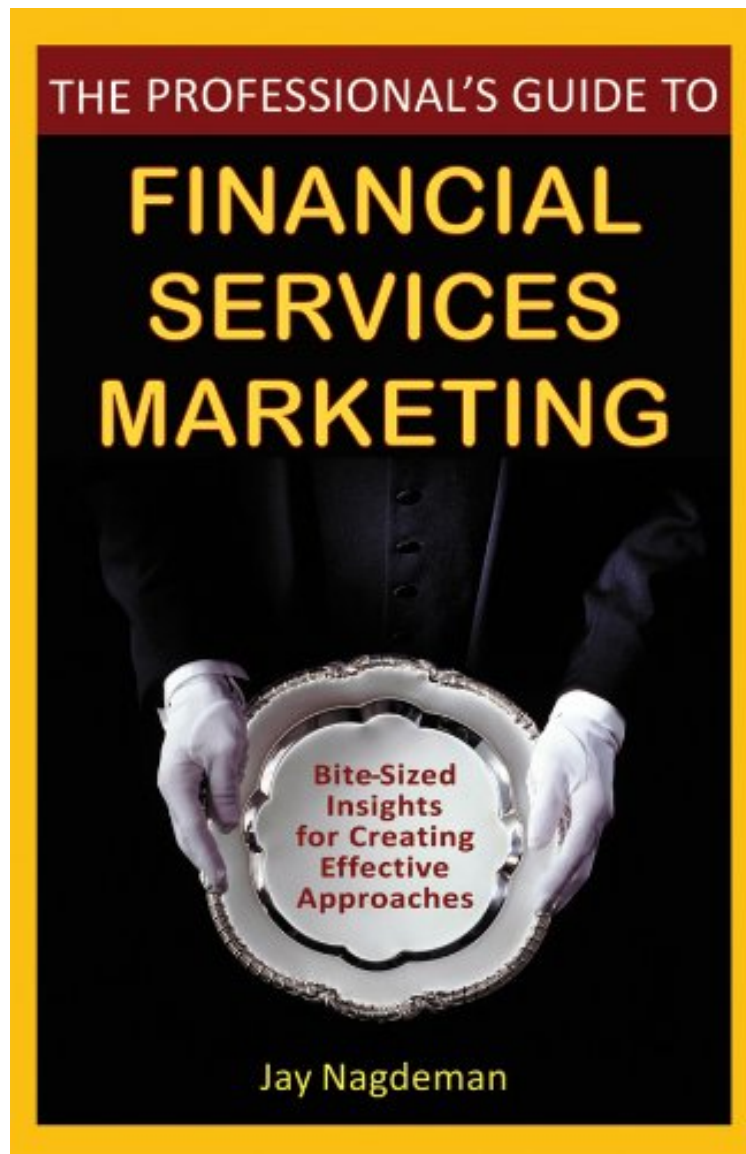


(Download pdf) The Professional's Guide to Financial Services Marketing: Bite-Sized Insights For Creating Effective Approaches

The Professional's Guide to Financial Services Marketing: Bite-Sized Insights For Creating Effective Approaches

Jay Nagdeman

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Jay Nagdeman : The Professional's Guide to Financial Services Marketing: Bite-Sized Insights For Creating Effective Approaches before purchasing it in order to gage whether or not it would be worth my time, and all praised The Professional's Guide to Financial Services Marketing: Bite-Sized Insights For Creating Effective Approaches:

1 of 1 people found the following review helpful. A good book for the reference libraryBy Nicholas AssefThis book

provides an excellent framework by which the marketing process for Financial Services Firms can be designed and implemented. One of those books you can refer back to in time, as it provides a solid foundation of specific marketing approaches that might be considered by the Firm.

4 of 4 people found the following review helpful. Great addition to the library of the seasoned Financial Services professional.

By Customer

This book is a good read and I highly recommend it for the financial services professional. Mr. Nagdeman conveys experience and wisdom. In my experience as a business coach and consultant, I've come across many financial services professionals who are stuck in a rut using the same marketing techniques as everyone else and trying to keep up with their competitors. This book instills structure and "Tactical Implementation" using branding as foundation, to help financial service professionals to differentiate themselves. The author sums up this problem neatly when he writes, "Unfortunately, many financial services executives fail to distinguish between strategically oriented, integrated marketing programs and specialized marketing activities implementation activities. For many, the 'M-word' is clearly a synonym for advertising or various others forms of promotion and tactical implementation - from direct mail programs and brochures to convention activities and chachkas." This illustrates the core problem with marketing in this industry- too much copycat behavior, too little differentiation. The real benefit of the book is the knowledge that you gain after establishing this problem, teaching you what to do to stand out and gain clients.

This book is a great addition to the library of the seasoned Financial Services professional, and a good foundation for the novice just entering the industry.

1 of 1 people found the following review helpful. Financial Services Marketing

By G. J. Hurley

5.0 out of 5 stars

A Real-World Resource for Financial Marketing Professional

By John Hurley

As a thirty-five year veteran of the financial services industry who has led the marketing efforts of several broker/dealers, I found this book to be both informative and insightful. What makes this book invaluable to the financial services professional is that the author understands from first-hand experience the unique mindset of financial services professionals when it comes to marketing and promotion. As I see it, the author's approach is ideal for getting financial professionals to "loosen up" and consider many new ideas. Each of the book's short chapters addresses a single marketing or promotional concept and encourages readers to consider its applicability in their business activities. The author pays special attention to strategic approaches that will help create "relevant differentiation," and also offers thoughts on how a variety of implementation approaches can be adapted for use in connection with financial products and services. While some of these approaches may be "old hat" in other industries, many are still in early stage adoption in financial services circles. Online marketing offers a perfect example of a potent marketing tool that the financial services industry is just beginning to explore. As a result, the book stresses the critical importance of the Internet and online marketing to the future of our industry and offers suggestions for effective online marketing.

This book adopts the tone of a discussion between financial professionals, rather than of a battle cry to do away with all the traditional approaches in favor of anything that is new and different. Instead, it discusses how each new concept can be effectively integrated in different marketing initiatives as part of the ongoing evolution of the financial services industry in this country. It is particularly relevant to the current times as financial services marketers seek new beginnings. I highly recommend it to anyone in the financial services industry who is serious about taking their marketing to the next level.

The Professional's Guide to Financial Services Marketing is directed to any financial services professional; from individual representatives to executives of large financial services companies; who is looking for better ways to create the relevant marketplace differentiation and competitive advantage needed to increase productivity and profitability. The purpose of this book is not to provide a how-to manual, but rather to offer practical information, examples, and thought-provoking tips that provide ideas and insights that will enable financial services professionals to improve their own marketing approaches and achieve ambitious marketing goals. With examples drawn from basic marketing approaches and successful consumer marketing, this book provides a fresh perspective on a variety of marketing issues that can make a significant difference to corporate success.

"In financial services marketing, Jay Nagdeman is the expert. He has helped scores of leading financial firms reach and then exceed their goals. And now he has assembled his insights in The Professional's Guide to Financial Services Marketing; a must-read for any executive with bottom-line responsibility at an asset management company, insurer or securities firm. This volume is destined to become a permanent reference tool for the industry." —Evan Cooper, Senior Managing Editor, InvestmentNews

"Jay Nagdeman is one of the financial industry's most innovative marketing minds. The time I spent reading The Professional's Guide to Financial Services Marketing was well rewarded with fresh insights that I look forward to successfully employing. His bite-sized approach makes this cornucopia of marketing concepts and ideas not only digestible, but an absolute pleasure to read. I highly recommend this book to anyone interested in discovering both what is new and what is timelessly true in financial services marketing." —Gil Weinreich, Editor, Research magazine

"Owning this book provides you with 24/7 access to some of the industry's most successful and innovative marketing thinking. It contains illustrations and vignettes taken from real-life marketing successes and failures. It also provides ideas that could help you turn successful consumer product marketing techniques into customized financial product marketing approaches. It can serve as a mentor, a

resource, a reference tool or simply a compelling look at some often overlooked and misunderstood marketing approaches." —Ken Dolan, Chairman, The Dolan Group of Companies

From the Inside Flap

Traditionally, the financial services industry has considered marketing more like an expense than a critical part of the business mix. By failing to embrace innovative marketing techniques, financial services organizations and their representatives have forgone billions of dollars in potential profits. As the financial industry experiences rapid, unprecedented change and reorganization, the need for smart, affordable ways to attract new clients is greater than ever. Now is the time for financial services marketers to go beyond conventional approaches and seek out more effective ways to increase marketplace productivity. It's time to take a new look at basic market elements, approaches and programs that are underutilized by financial services marketers. It's also time to identify successful consumer marketing techniques that can be adapted specifically for financial products and services. The Professional's Guide to Financial Services Marketing offers a compendium of practical information, smart ideas and thought-provoking tips that provide a fresh perspective on the marketing issues that have real impact on the success of any financial services business—from a small insurance agency, RIA or brokerage firm to a diversified global product or service provider. Though much has been written about new marketing practices, very little of it has specifically addressed the special needs of the financial services industry. The Professional's Guide to Financial Services Marketing fills this gap. It recognizes that financial marketers must work within regulatory constraints to sell intangible products that significantly impact the lives of their customers. Each chapter explores a different marketing concept, technique or approach, and provides ideas that can help financial services marketing practitioners meet the challenge of today's hyper-competitive, continually evolving marketplace.

From the Back Cover