

# Flip your approach to writing and editing

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ACES 2022

# PERSPECTIVE

A man with a beard, wearing a blue shirt, is looking out from a high-rise building. The building's glass and metal structure is visible, and the man's hands are resting on a railing. The background is a clear blue sky with some clouds.

**CHANGES EVERYTHING.**

**WIPFLI**

# Does your story plan look something like this?



We need a more strategic way  
or we're just adding to the content chaos.

- How are you going to capture their attention?

Where/how are you going to distribute?

How are you going to capture their attention?

Whose eyes do you want to capture?

What do you want them to do?

Write and edit

How are you doing to solve a problem for them?



- How are you going to capture their attention?

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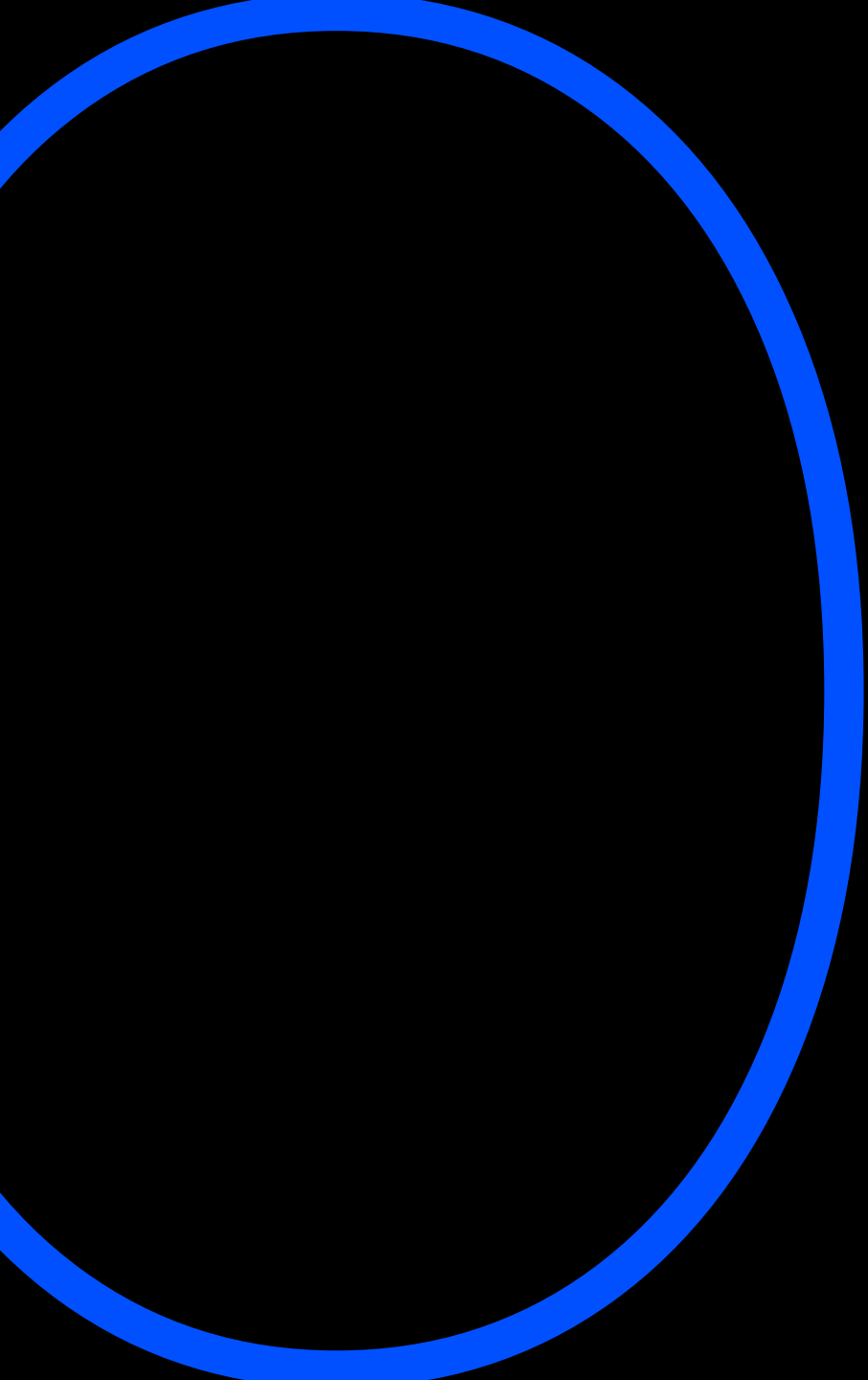
Where/how are you going to distribute?

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So let's build a story plan



**Whose eyes do you want to  
capture?**

Content created for everyone appeals to no one.  
You have to identify your audience.

All these people have different problems, make decisions in different ways,  
consume information in different ways at different times.



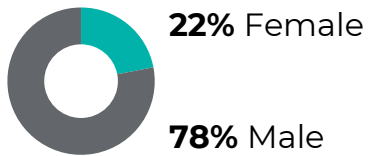


# FI CEO persona



Tech Supporters  
Talent Seekers  
Purpose-Driven

Average Income: \$415K  
Average Tenure: 5 Years  
Average Age: 58



## Who I am

I am under relentless pressure to deliver results while also transforming my business. Employees, customers and communities are looking for leadership from me that can be trusted—that is real and authentic amid all the turbulence of the past year.

I am also doubling down on operational efficiencies and looking to digital automation as a solution.

## My Business Interests

- Operational efficiencies to help drive growth
- Advanced tech that is viewed as both cost-cutting and offering revenue-generating opportunities
- Improving talent

## Why Wipfli

- Cost meets my expectation of the work provided
- I believe their approach will produce a quality product or service
- They were referred by a trusted source
- They have a reputation for producing results

## My Personality

- I enjoy being the center of attention
- I prefer to shop at stores that specialize in a specific style or product
- I consider myself sophisticated
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## My Values

- I enjoy having power to effect change
- Status and wealth are important to me
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## How I Connect



**53%** search for products via mobile



**76%** are active on social networking site



**65%** regularly stream music



**42%** use a video streaming service



**20+** hours a week on email



**64%** are mobile ad & app happy



**12%** listen to podcasts



**30+** hours a week online

## My Digital Priorities

- Workflow
- Cybersecurity
- Online experience

## Think + Feel

I have a cautiously optimistic outlook for 2021. I am concerned about talent optimization. I believe the right technology can make my business more efficient.

## Hear

I am hearing the need to keep up with advancements in technology. I also hear that we need to better differentiate ourselves from the competition.

## See

I am seeing skill deficiencies in various personnel, mainly in digital and technology. I am seeing where technology can help better our processes.

## Say + Do

I am telling everyone the importance of staying ahead of digital trends, and I am looking for resources to help. I am sharing my vision often.

## Pain

- Skill deficiencies [digital/technical literacy]
- Technology gaps

## Gain

- Talent Optimization Strategy
- Digital Optimization Roadmap

# A note about personas

- They're controversial
- Homogenize your audience
- Reinforce inaccurate and irrelevant stereotypes
- Assume people honest in interviews
- Ignore buying teams

Is focusing on “jobs to be done” better?

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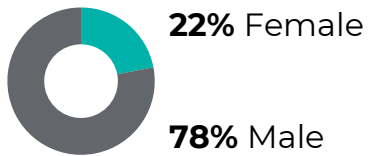
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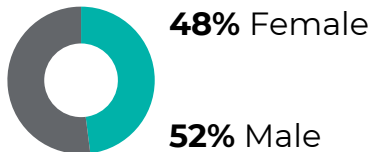
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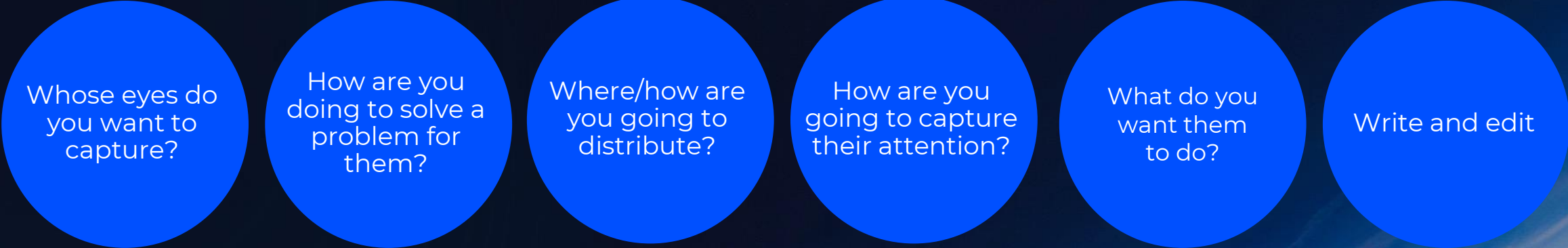
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## Gain

- Enhanced customer loyalty
- New brand touchpoints

# Manufacturing co. owner

Persona: MAD owner, \$250-\$500M				
 <b>Manufacturing owner</b>	<b>Who am i ...</b>  Man 55-70 years old Self-made Philanthropic. Donates to education, health, industry Owns a side business Owns more than one home	<b>3 reasons to use your product/services</b>  1. Transition business (or prepare) 2. Preserve wealth 3. Estate planning		<b>3 reasons to buy your product/services</b>  1. Ensure smooth transition of business 2. Get the best value 3. Secure my retirement and future of generations
	<b>My interests</b>  Positive-goal oriented people People who mentor and to be a mentor Lifelong learner and always setting new goals Read: biographies of successful people, self-help, history Opinions of other successful people	<b>My personality</b>  Early riser (3 hours before office) Work 50+ hours Value passion over education Straight talk, no sales lingo, long pitch Maverick Like to give feedback	<b>My skills</b>  Persistent Tech user to speed information consumption, be innovative Translate dreams to tangible steps Understand business finance	<b>My dreams</b>  I want to achieve my own dream, not one set by someone else I want to leave a legacy for my family, business
<b>My relationships with technology</b>  Advanced internet user Like tech for speed, efficiency and control/access to info it gives me on-demand I use LinkedIn for group connections, networking but typically not business sourcing				



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CMO of a  
bank

# Why the CMO?

- Because pain points align with solution that is a strategic initiative in my firm.
- The CMO needs an app – and that's can be a gateway for us because apps aren't just apps. They're the face of a whole host of services and products we provide.
- The CEO has a lot of different pain points; I can better target the CMO.
- The CMO is likely the entry point for the solution.





**How are you going to  
solve a problem for  
them?**

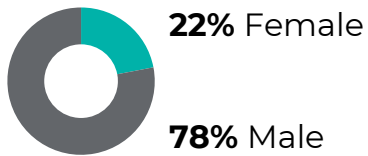
What do they need from you?  
It's never about you. It's always about them.

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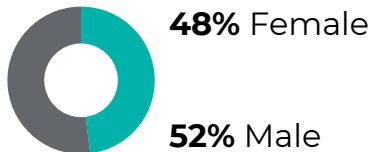
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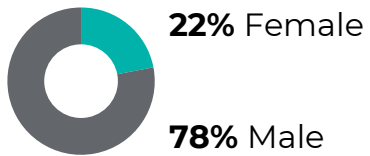
Having a solution isn't enough.  
It needs to be the right solution at the right time.

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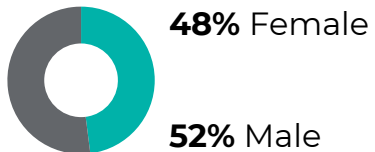
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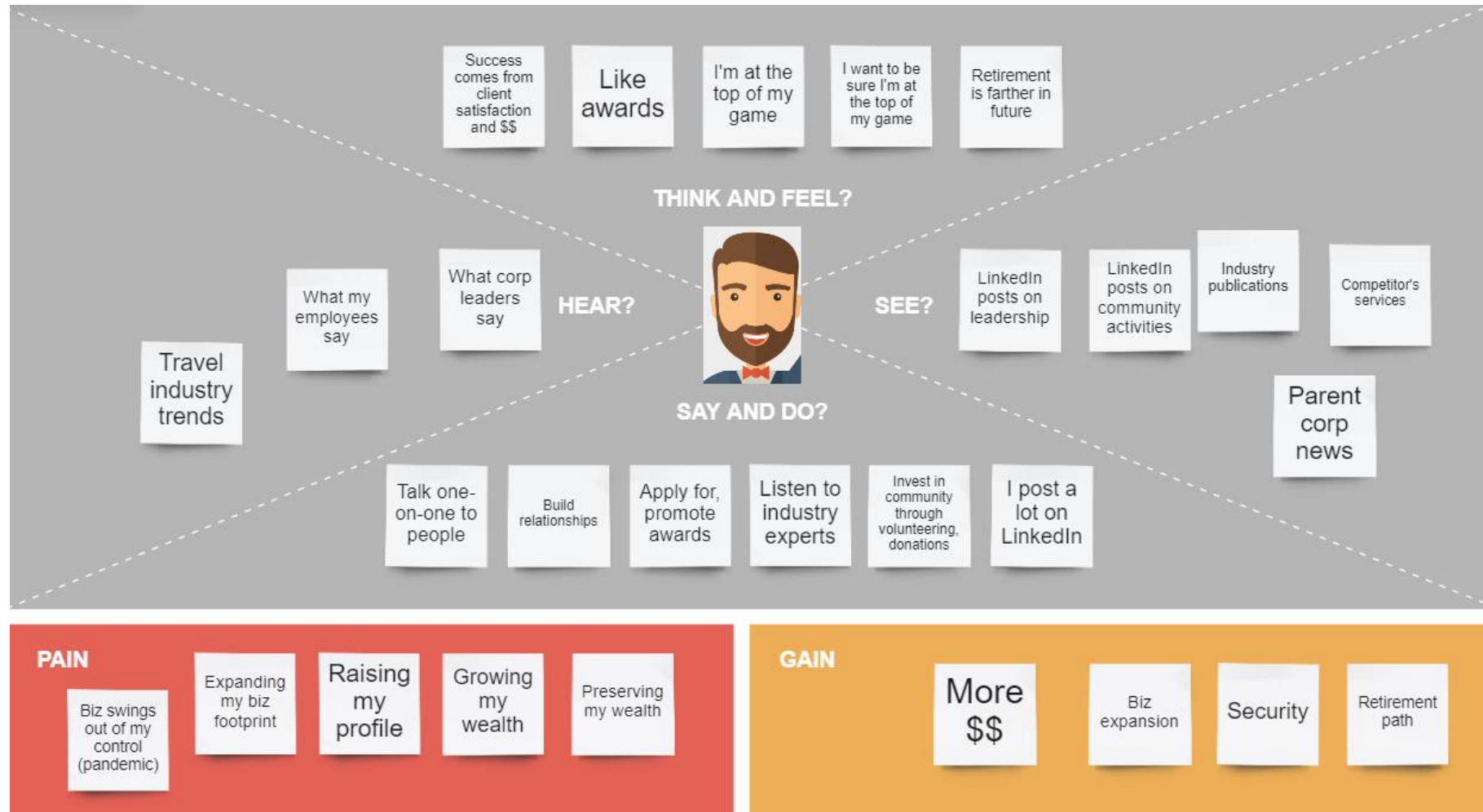
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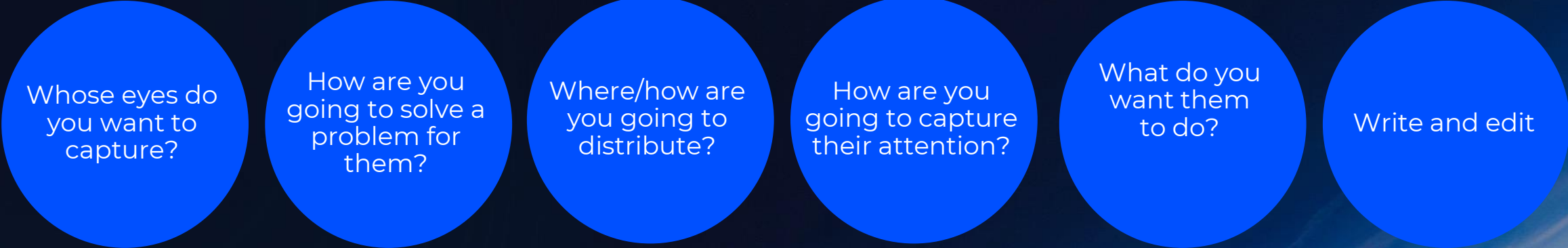
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# Empathy map





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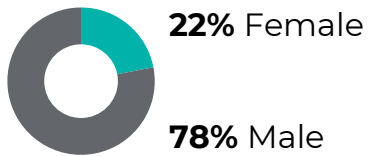
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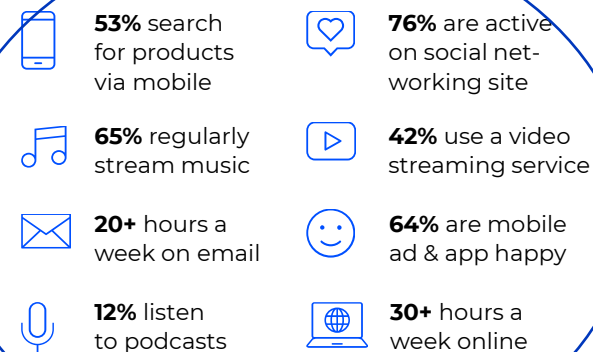
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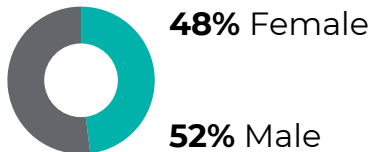
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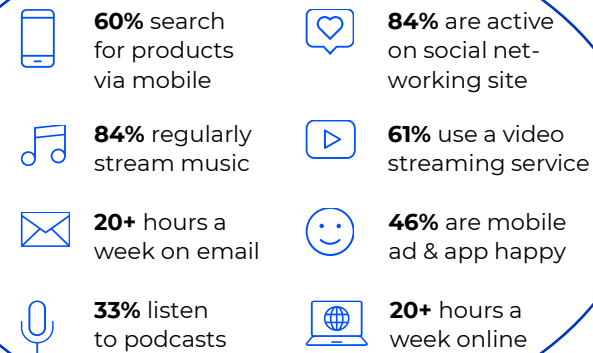
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# A gross over-simplification

- I love to read print magazines
- You are going to market to me
- You cannot place a video inside a print magazine (today)

# Here's where common sense comes in

## **CMO is on mobile**

Needs to be responsive, easy to read

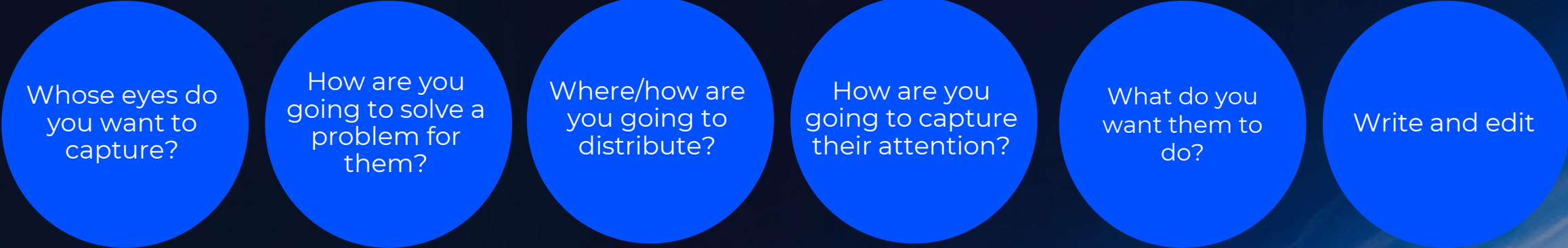
## **CMO is on social**

Networking with other leaders

## **CMO streams video and music**

But what video and what music?





Whose eyes do  
you want to  
capture?

CMO of a  
bank

How are you  
going to solve a  
problem for  
them?

I'm will  
build an  
app for  
you that  
increases  
CX/CE

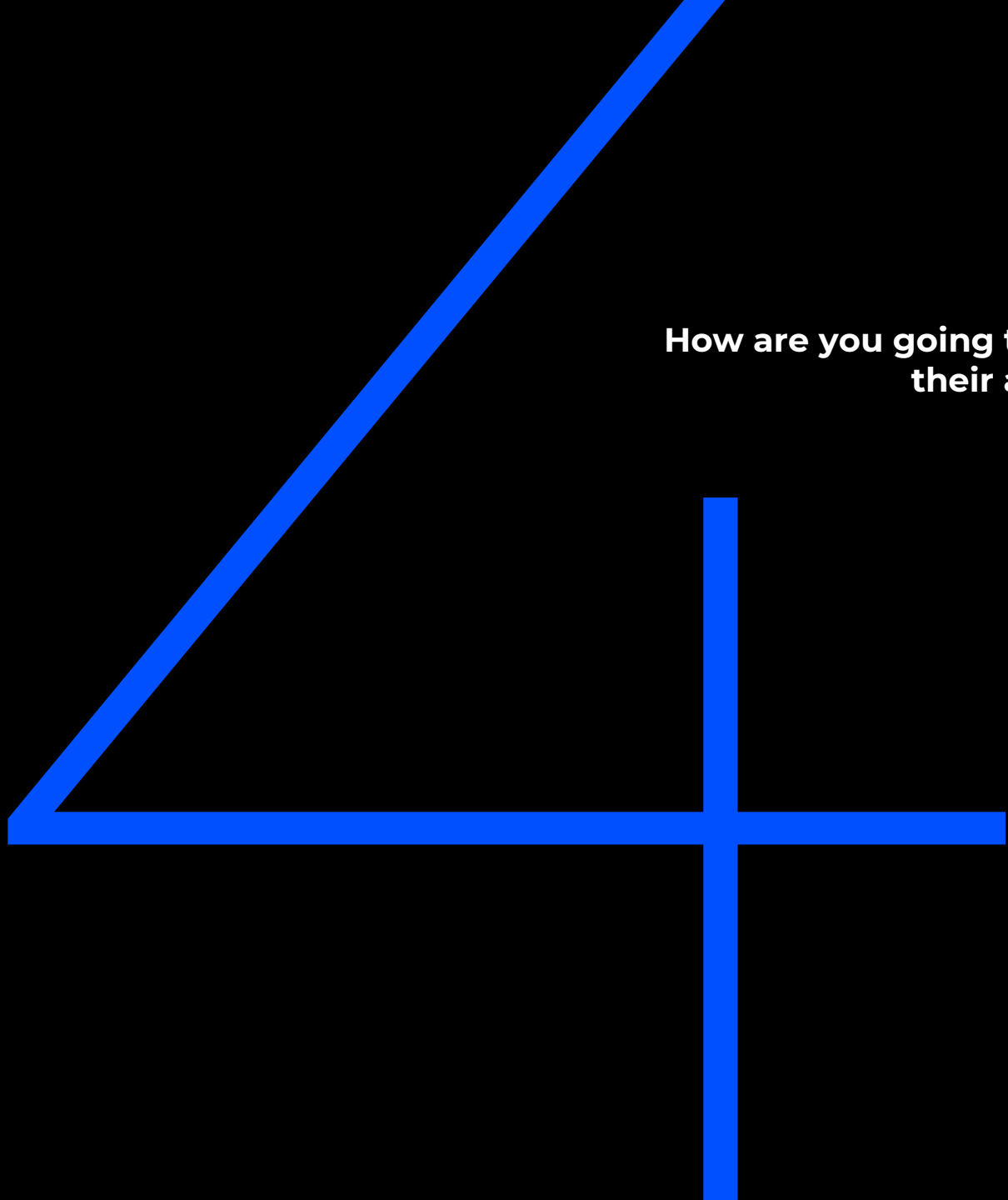
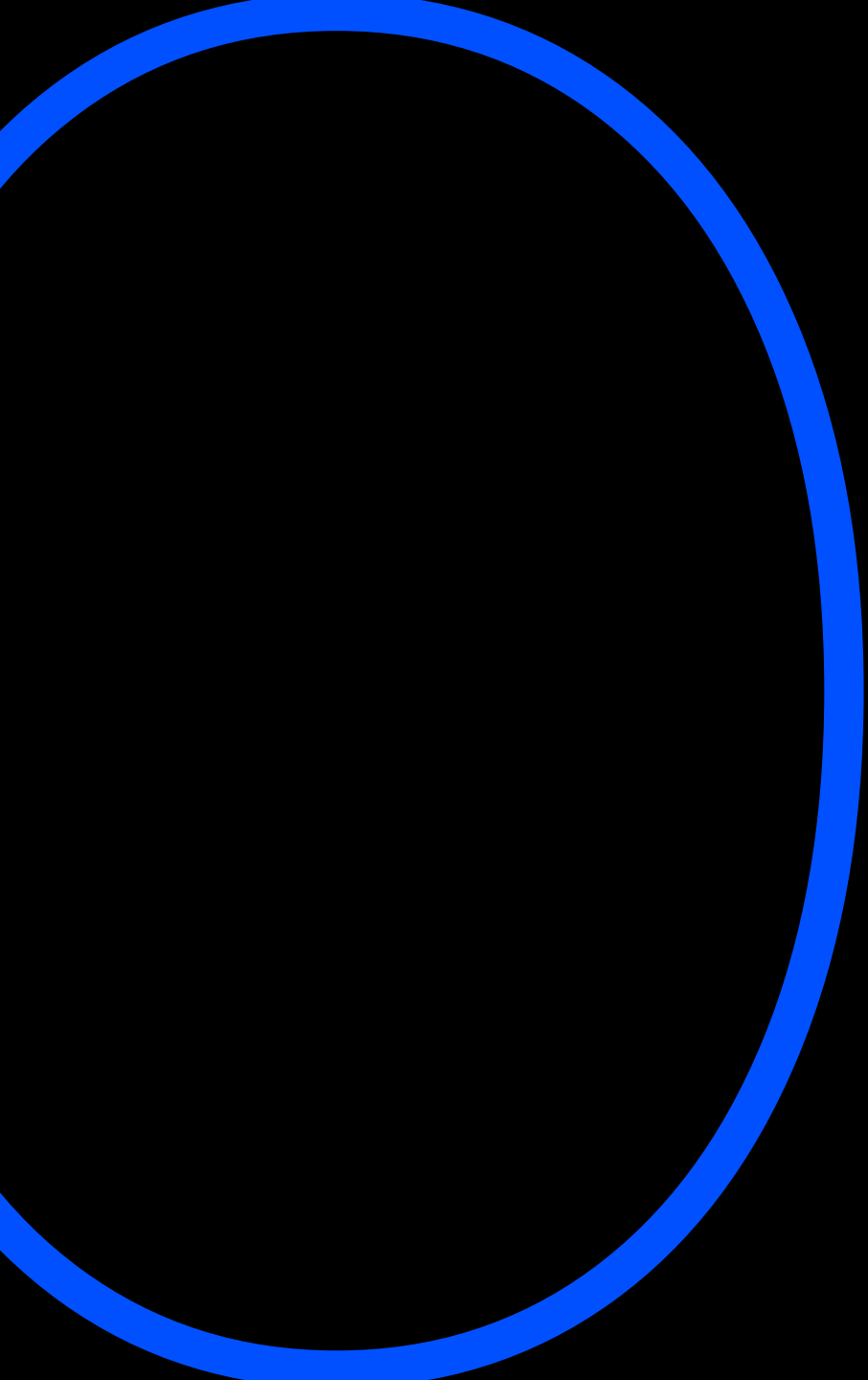
Where/how are  
you going to  
distribute?

Push on  
social  
media

How are you  
going to capture  
their attention?

What do you  
want them to  
do?

Write and edit



**How are you going to capture  
their attention?**

Psychographic information: Beliefs, values, lifestyle,  
social status, opinions and activities.

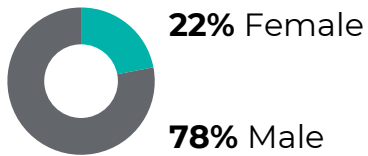
I can capture your attention by crafting content that  
speaks to your “soul.”

# FI CEO persona



Tech Supporters  
Talent Seekers  
Purpose-Driven

Average Income: \$415K  
Average Tenure: 5 Years  
Average Age: 58



## Who I am

I am under relentless pressure to deliver results while also transforming my business. Employees, customers and communities are looking for leadership from me that can be trusted—that is real and authentic amid all the turbulence of the past year.

I am also doubling down on operational efficiencies and looking to digital automation as a solution.

## My Business Interests

- Operational efficiencies to help drive growth
- Advanced tech that is viewed as both cost-cutting and offering revenue-generating opportunities
- Improving talent

## Why Wipfli

- Cost meets my expectation of the work provided
- I believe their approach will produce a quality product or service
- They were referred by a trusted source
- They have a reputation for producing results

## My Personality

- I enjoy being the center of attention
- I prefer to shop at stores that specialize in a specific style or product
- I consider myself sophisticated
- I like to shower my loved ones with gifts

## My Values

- I enjoy having power to effect change
- Status and wealth are important to me
- I have ambition to lead and get ahead
- I protect my public image
- I seek adventure and risk

## How I Connect



**53%** search for products via mobile



**76%** are active on social networking site



**65%** regularly stream music



**42%** use a video streaming service



**20+** hours a week on email



**64%** are mobile ad & app happy



**12%** listen to podcasts



**30+** hours a week online

## My Digital Priorities

- Workflow
- Cybersecurity
- Online experience

## Think + Feel

I have a cautiously optimistic outlook for 2021. I am concerned about talent optimization. I believe the right technology can make my business more efficient.

## Hear

I am hearing the need to keep up with advancements in technology. I also hear that we need to better differentiate ourselves from the competition.

## See

I am seeing skill deficiencies in various personnel, mainly in digital and technology. I am seeing where technology can help better our processes.

## Say + Do

I am telling everyone the importance of staying ahead of digital trends, and I am looking for resources to help. I am only interested in talking to vendors with FI-specific experience..

## Pain

- Skill deficiencies [digital/technical literacy]
- Technology gaps

## Gain

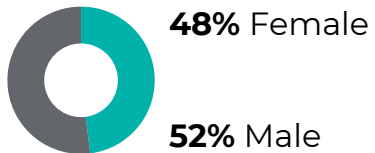
- Talent Optimization Strategy
- Digital Optimization Roadmap

# FI CMO persona



Rainmaker  
Multitasker  
Pioneer

Average Income \$245K  
Average Tenure 3.5 Years  
Average Age 54



## Who I am

In my role as CMO I have emerged as an executive leader charged with advancing the growth strategies and revenue generation of the organization.

Armed with a clear vision of the brand—and more importantly, the understanding of the brand's place in the mind, lives and wallets of the customer—my initiatives are expected to impact the bottom line and champion the customer experience.

## My Business Interests

- Assuring a positive customer experience and appropriate brand representation
- Advancing technology and how, through its adoption, it may lead to greater competitive advantages
- Business solutions that showcase the role's strategic value and potential to affect revenue

## Why Engage

- Cost meets my expectation of the work provided
- They were referred by a trusted source
- They have a reputation for producing results
- I believe their approach will produce a quality product or service

## My Personality

- I enjoy being the center of attention
- I enjoy showing off my home to guests
- Even though everything looks messy, I know where everything is
- I consider myself sophisticated
- I buy brands that reflect my style

## My Values

- I enjoy having power to effect change
- I aspire to get ahead
- Adventure and risk is important to me and I want stimulating experiences
- I am open minded

## How I Connect



**60%** search for products via mobile



**84%** are active on social networking site



**84%** regularly stream music



**61%** use a video streaming service



**20+** hours a week on email



**46%** are mobile ad & app happy



**33%** listen to podcasts



**20+** hours a week online

## My Digital Priorities

- User Experience
- Business Intelligence
- Technology Updating

## Think + Feel

I feel I'm under great pressure to show my team how important providing optimal customer experiences are and then figuring out how to do just that with a limited budget.

## Hear

I hear about new ways to analyze customer and business data that will provide me ideas on how I can help to grow revenue.

## See

I am exposed to many technological and data analysis advancements and I want help in integrating these into my organization.

## Say + Do

When I engage with vendors, I make sure they have the required expertise in a service, but not experience in my specific category [commercial bank v credit union].

## Pain

- Internal perceptions of value
- Time to research and develop solutions based upon latest advancements

## Gain

- Enhanced customer loyalty
- New brand touchpoints



## Psychographic information

---

Likes feeling unique, special

---

Will be drawn to aspirational  
v. technical

---

Needs strong assurance this  
is the right decision

---

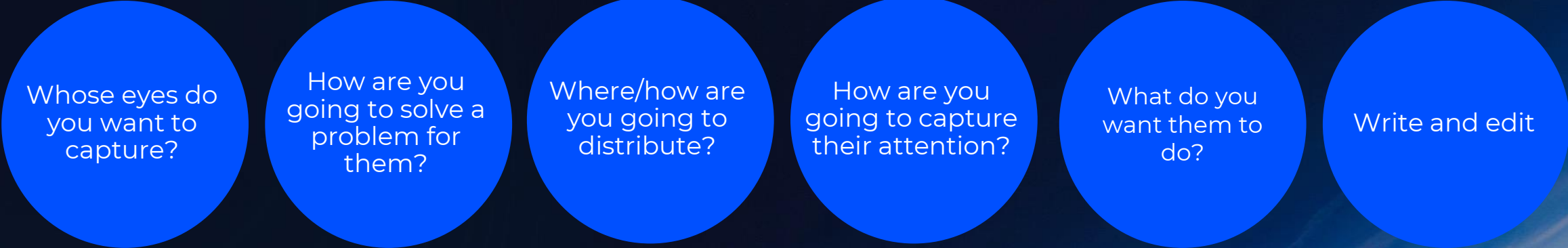
Open-minded, draw by new  
ideas

---

Wants to be rainmaker,  
pioneer

---

Drawn by sophistication



Whose eyes do  
you want to  
capture?

CMO of a  
bank

How are you  
going to solve a  
problem for  
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I'm will  
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Push on  
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How are you  
going to capture  
their attention?

I'm going  
for flashy,  
non-  
bank, CX  
app story

What do you  
want them to  
do?

Write and edit



5

**What do I want them to do?**

A common mistake is in how you define conversion.

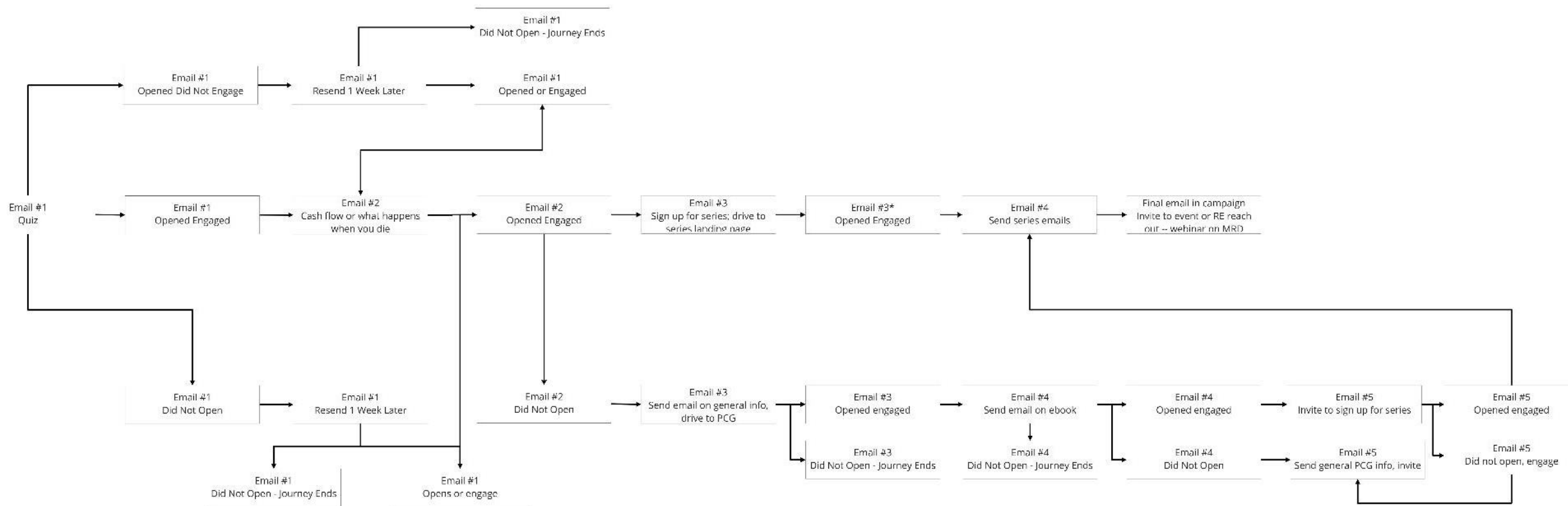
# Sample engagement journey

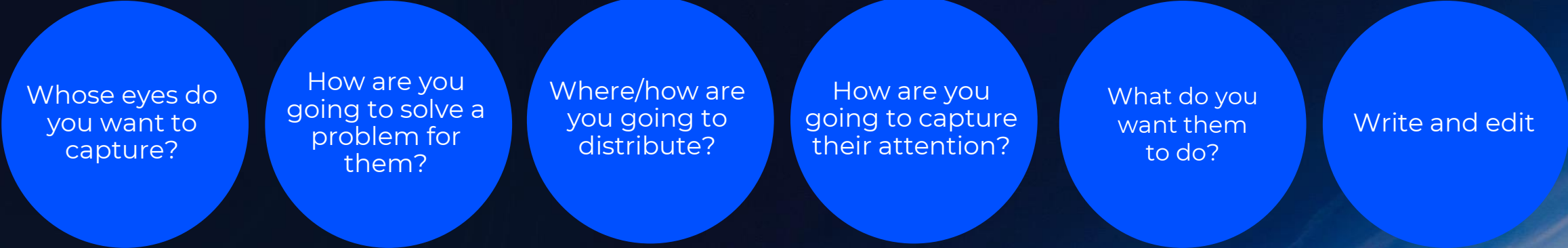


<b>THINK</b>	<p>"I need to stay current."</p> <p>"I enjoy the camaraderie of our profession."</p> <p>"What new developments are there?"</p>	<p>"Can we handle this ourselves?"</p> <p>"Who do I know who might have been here before?"</p>	<p>"Do I know any consultants who've handled this type of thing before"</p> <p>"Who in my peer group knows someone they'd vouch for?"</p> <p>"Where else can I look for information about consultants?"</p>	<p>"How has this consultant performed on other challenges like this one?"</p> <p>"How has this consultant worked with other businesses like mine?"</p> <p>How well will this consultant fit with my business?"</p>
<b>DO</b>	<ul style="list-style-type: none"> <li>Attend webinars and conferences</li> <li>Read regulatory and compliance updates</li> <li>Consume news media</li> <li>Participate in peer networking (formal and informal)</li> </ul>	<ul style="list-style-type: none"> <li>Add another thing to their "to do" list</li> <li>Reach out to their network</li> </ul>	<ul style="list-style-type: none"> <li>Discuss with their network</li> <li>Look for support or advice from custodians</li> <li>Build a shortlist of potential consultants</li> <li>Begin due diligence, looking into consultants websites and checking with their network</li> </ul>	<ul style="list-style-type: none"> <li>Create a "book of knowledge" on potential consultants</li> <li>Reach back out to their network</li> <li>Complete due diligence, looking into consultants websites and checking references</li> </ul>
<b>CHANNELS</b>	<ul style="list-style-type: none"> <li>RIA study groups</li> <li>Conferences (e.g. Impact)</li> <li>RIA content (e.g. Kitces, Allworth, RIABiz)</li> <li>Custodians</li> <li>National business press</li> <li>National general press</li> </ul>	<ul style="list-style-type: none"> <li>RIA study groups</li> <li>Peer, colleague and client networking</li> <li>Custodians</li> </ul>	<ul style="list-style-type: none"> <li>Personal experience</li> <li>RIA community</li> <li>Custodians</li> </ul>	<ul style="list-style-type: none"> <li>Professional network</li> <li>Consultants' case studies and propaganda</li> <li>"In-person" meetings and chemistry checks</li> </ul>

# Sample engagement journey

## Manufacturing





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How are you  
going to capture  
their attention?

I'm going  
for flashy,  
non-  
bank, CX  
app story

What do you  
want them  
to do?

To start,  
just check  
out my  
client  
impact  
story

Write and edit

# 5

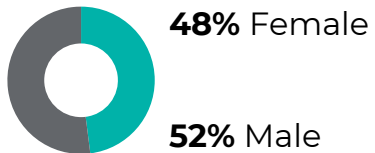
**Write and edit**

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- Time to research and develop solutions based upon latest advancements

## Gain

- Enhanced customer loyalty
- New brand touchpoints



**Let's recap  
what we  
know**

---

CMO under pressure to  
increase loyalty

---

Doesn't want boring bank  
vendor

---

Needs an app

---

Has limited \$\$ to spend on  
budget

---

Consumes content on social  
media

---

Data and analytics is  
secondary priority

**What am I going  
to create?**

01

Build for social  
first

---

02

Aspirational,  
innovative,  
unique, boutique

---

03

Proven success,  
quick results

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you want to  
capture?

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going to solve a  
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app story

What do you  
want them  
to do?

Check  
out our  
web page  
showing  
our app  
prowess

Write and edit

I am  
going to  
create  
flashy  
video



Write and edit

I am  
going to  
create  
flashy  
video

Write and edit

Non-bank  
client  
impact  
story

Write and edit

Going to  
create  
interactive  
quiz on  
“how  
innovative  
are you” to  
capture  
email

Write and edit

Thank  
you email  
with quiz  
results  
and drive  
to second  
client  
impact  
story

Write and edit

Paid,  
targeted  
ads to the  
quiz

Write and edit

Quiz  
results  
page that  
leads to  
client  
impact  
story  
with form  
fill

**THAT'S**  
digital.wipfli.com

**DIGITAL**  
**DONE.**  
**—**



A nighttime photograph of a dense urban skyline. Several tall skyscrapers with glass facades are visible, many of which have interior lights glowing, creating a pattern of small white rectangles against the dark blue and black building exteriors. The sky is a deep, clear blue. In the center of the image, there is a solid blue rectangular box containing the text "WIPFLI" in white, serif, all-caps font. The box is positioned over a cluster of buildings, with a prominent one having a stepped, geometric design and many lit windows.

WIPFLI

**KWIK TRIP**

# REVVING UP LOYALTY.





- How are you going to capture their attention?

Whose eyes do you want to capture?

How are you doing to solve a problem for them?

Where/how are you going to distribute?

How are you going to capture their attention?

What do you want them to do?

Write and edit

# Content today

**4.4M-7.5M**

new blog posts a day

**2M**

LinkedIn posts a day

**333.2B**

emails sent and received each day



If you're not strategic, you're just adding to the content chaos.

# Questions?

**Teresa Schmedding**

Director of content and communications, Wipfli

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[teresa@schmedding.com](mailto:teresa@schmedding.com)