

The Complete Guide to Using an Intern to Help Market your Financial Advisory Business

Advisor Checklist - Before Your Intern Arrives

Recruiting

- Where to recruit
 - Local colleges and universities
 - Professional associations
 - Online job boards (Indeed, etc.)
- Start recruiting interns 3-4 months prior to your desired start date
 - Summer: Recruit February/March
 - Fall: Recruit May/June
 - Spring: Recruit September/October
- [Download our sample digital marketing internship job description to get started](#)

Determine Marketing Tasks to Assign

- Developing social media content
- Scheduling social media content
- Research topics and map out your blog editorial calendar
- Drafting blog posts
- Twenty Over Ten users: Choosing [Content Assist](#) articles from the library and editing to include keywords you want to rank for.
- Research for potential guest bloggers, draft emails to those guests.
- Pull reports on website and social media analytics, present monthly to team.

Establish the Tools You'll Use

- Evernote
- Hootsuite / CoSchedule - Scheduling social media content
- Twenty Over Ten 😊
- Slack
- Trello
- G Suite

Once on the Job

- Make introductions
- Outline objectives, roles and responsibilities

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- Get setup on communication tools like Email, Zoom, Slack, Google Docs, etc - set them up and give them access, show them how to use. If you use a password sharing tool like Dashlane or LastPass, make sure they create an account and share passwords with them in advance of their first day.
- Have them create (and you approve) an email signature if they might be emailing people for guest blog posts, etc.
- Review the below “Intern Checklist - Initial Planning & Strategy Tasks” with the intern.
- Create Initial Training Schedule
 - First week - Meet more often. Perhaps 3x week for 2 hours at a time
 - Second - fourth weeks - Meet 2x per week for 1.5 hours each time
 - Ongoing after initial training - Meet 1x per week for 1.5 hours at a time
- Establish Expectations
 - Ask that the intern create and send a Productivity Report/Update to you WEEKLY
 - What did the intern accomplish that week
 - What projects are they currently working on
 - Timelines for deliverables
 - What are they waiting on from you/your team or others
 - Also ask them to create and send an Analytics/ROI report to you MONTHLY
 - Growth in social media followers by platform
 - Highest engaging posts, by platform
 - Times of day that posts have been most successful
 - Any trends they are seeing in what is working
 - What is NOT performing well, and why
 - We suggest 1x week for 1.5 hours
 - The difference in marketing for financial services - compliance concerns, including [Social Media Compliance](#) and Blogging Do’s and Don’ts.

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This next section is for you to give to your new intern!

Intern Checklist - Initial Planning & Strategy Tasks

Social Media

Initial Planning:

1. Start here: [Setting Up Your Social Media Profiles. A Checklist for Financial Advisors](#)
2. Next, ensure you understand [Social Media Compliance for Financial Advisors](#)
 - a. Ask our team how we must handle compliance specifically, and what process we must take for getting posts approved or archived
3. Request to be added as an admin on all social media profiles we currently have, giving you full access to edit and manage.
4. Audit all firm and individual social media profiles
5. Create profiles on any social media platforms we want to utilize but have not yet been setup on - Facebook, LinkedIn, Twitter, Instagram, Youtube
6. Choose social media scheduler that will be used to upload and schedule all posts for the month (We suggest [Lead Pilot!](#)), get it setup and connected to your social media accounts.
7. [Research topics](#) the firm should post about
 - a. Original blog posts written by our firm
 - b. Third Party posts from other sites online (Forbes, Wall Street Journal, etc)
 - c. Other influencers that are relevant (local community organizations, CPA firms, Estate Planning Attorneys, etc)
8. Create Monthly Editorial Calendar Template: [Use our Sample to Get Started](#)

Should include:

 - How often we will post
 - What days we post on
 - Time of day
 - Who is in charge of what
9. Work with your supervisor to determine what your strategy/approach will be for:
 - How often you will check in on the firms social media accounts
 - What you will do if someone likes, comments or shares a post
 - How to handle responding to comments or questions
 - Who will respond to direct messages.

Weekly:

- Upload content into the social media app on Fridays that will be posted for the entire next week (Sunday - Saturday)
 - Here's how to [Promote your original blog content on social media](#)
- Check social scheduling app to ensure all content that was loaded is being published as it should be, troubleshoot.

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- If anyone comments on a social media post or re-shares, immediately “like” their post or comment.
- Alert supervisors to any comments or messages that come in. If you are tasked with drafting responses - send your response to your supervisor immediately for approval BEFORE posting and responding.

Also see: [Social Media Checklist For Financial Advisors: Daily, Weekly & Monthly To-Dos](#)

Blogging

Initial Planning:

1. Start here: [Blogging for advisors 101: How to get started in 60 minutes](#)
 - Next, watch our webinar on [How to get started Blogging](#)
 - Spend time learning the Basics about blogging:
 - Memorize the components to [writing an SEO \(search engine\) friendly Blog Post](#)
 - Bookmark the top [10 blogging mistakes we see advisors making](#)
2. [Research topics](#) the firm should post about
 - See: top [10 blog post ideas that advisory firms should](#) use to let current and prospective clients get to know them better
 - Here is a list of additional blog post ideas to consider:
 - How-To's
 - Common Questions
 - Your Opinion on a Related or Trending Topic
 - Storytelling of Either a Client's Journey or Your Own
 - Typical Financial Issues
 - Must-Have Lists
 - Review/Your Stance on a Topic or Another Article (from the Wall Street Journal, etc.)
 - News and Events
 - Your Personal and Firm Awards and Accomplishments
 - Interviews with Expert Guests (real estate, CPA, estate planners, etc)
 - *Keep in mind, each idea should be tailored to your niche/client type. So if you serve doctors/medical professionals, you might have “how to create a budget for your first year out of medical school, or common questions medical residents have about paying down debt versus saving for retirement”.*

Weekly:

1. Draft one additional blog post (choose from list of ideas above), upload into Twenty Over Ten blogging tool. Don't forget to Include:
 - a. [Header tags](#) that include targeted keywords

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- b. Meta description for SEO purposes
 - c. Featured image (You can find [free stock photos to use here](#))
 - d. Again, reference [to write an SEO \(search engine\) friendly blog post](#)
 - e. Also again reference what [not to do - avoid these blogging mistakes](#)
2. Choose 3 content assist articles from the Twenty Over Ten library, edit them to be customized for the financial firm's audience (Here is a [how-to guide, with video tutorial](#))
 - a. Note: meta descriptions, headlines, and images are already included with Content Assist blog posts. You may want to [edit this to be more specific your audience.](#)
 3. Once you have the blog posts drafted, send "preview link" to supervisor to review and approve. DO NOT PUBLISH WITHOUT APPROVAL
 4. Make sure that any blog posts that are scheduled to be posted on social media that week have been published LIVE. You don't want to schedule a post on social and link to a blog that hasn't been published yet!

Sample Editorial Calendar:

[Access our sample editorial calendar & guide here](#)

Sample Research Topic Planner:

[Download our sample research topic planner here](#)

Questions?

Email Us: marketing@twentyoverten.com

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