

**Ep #295: Storytelling to Build Your Brand: A
Conversation with Kelly Moorman**

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Maddy Roche

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Narrator: [00:00:01] Join your host, Maddy Roche, as she brings you into a community of fee-only financial advisers who are successfully building profitable businesses that serve the next generation of clients. Learn from innovative advisers whose unique stories will inspire you to dream big and take action on your goals. Are you ready to live your best life and help your clients live theirs? Then you're in the right place.

Maddy Roche: [00:00:25] Hello and welcome to this episode of #XYPNRadio. I'm Maddy Roche your host. I'm honored to have XYPN's Director of Brand Communications, Kelly Moorman, on the show with me today to talk about all things brand. Kelly is a trained chemist, but married her experience with large data sets, with her passion for storytelling. And today she shares with you some of her best advice as a professional marketer. You'll hear Kelly today talk about developing a tone and a voice that is real and how that helps define your brand architecture and ultimately allows you to tell an authentic story that resonates with your audience. She encourages you to embrace repelling audiences as much as you embrace attracting them and reiterated the importance of knowing who you're speaking to and meeting them where they are. We discuss marketing metrics you should care about what it's like to stay motivated and creative in the world of COVID and we even talk about her best marketing book recommendations. Kelly will leave you feeling motivated to evolve and iterate and play with your marketing strategy, even if you're not a marketing guru. She'll inspire you to be yourself, staying true to what you want to build and most importantly, not wasting any time on things that aren't working. If you're interested in hearing from a professional brand expert, then this show is for you.

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Maddy Roche: [00:01:45] Avocado toast, selfies, a mountain of student loan debt. Gen Y is anything but traditional, and with over seventy five million people, it's a population you don't want to ignore. Learn more about how to serve this unique population in our guide called Attract and Profitably Serve Millennial clients in your RIA. Discover three key ways to tap into the millennial market in six things that they want from their financial advisor. Visit XYPlanningNetwork.com/Millennials for your free copy.

Maddy Roche: [00:02:19] You can find any of the resources we mentioned during the episode at XYPlanningNetwork.com/295. Also be sure to go to XYPlanningNetwork.com/VIP to join a private group just for #XYPNRadio listeners. It's the community of advisors we've all been looking for that's there to provide support when we need it the most. Best of all, it's free. I encourage you to check it out. Again, that's XYPlanningNetwork.com/VIP. Without further ado, here's my interview with Kelly.

[00:02:50] -- swish --

Maddy Roche: [00:02:50] Hello, Kelly, welcome to #XYPNRadio.

Kelly Moorman: [00:02:54] Hi, Maddy. Thanks so much for having me.

Maddy Roche: [00:02:57] Of course, I've so looked forward to having you. It's not often that we have folks that aren't financial planners, but you are so perfectly positioned to be on this radio show of ours. And I can't wait to chat with you about your career and what you do and why members and financial advisors around the country should care.

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Kelly Moorman: [00:03:15] Thank you. It's one of my favorite questions to answer, why should people care? So I'm excited to take it on.

Maddy Roche: [00:03:21] Awesome. Well, Kelly, go ahead and do the honors. Introduce yourself and your role here at XYPN. Of course, you are a coveted XYPN teammate.

Kelly Moorman: [00:03:30] Thank you. Yes, I am XYPN's Director of Brand Communications. That is my official title, but I prefer my unofficial title, which is the Guardian of the XYPN Galaxy. -

Maddy Roche: [00:03:44] (laughter)

Kelly Moorman: [00:03:44] - (laughter) That really means that I am the gatekeeper of the XYPN brand. So in a nutshell, I'm really responsible for ensuring that we are communicating the right messages through the right channels at the right time, all day, every day. And really, I am essentially XYPN de facto storyteller.

Maddy Roche: [00:04:03] Yes, yes. I don't think anyone on this team can tell a story is as good as you. And I want to ask you about your theory around storytelling as we dive deeper into this interview. But you weren't always the Director of Brand Communication here at XY, and I'd be interested in just a little bit how your role has evolved at XY and then we'll dig into your career.

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Kelly Moorman: [00:04:22] Absolutely, yes. So in March I will have been here for three years. But as you mentioned, I was not always the Director of Brand Communications. So when I first came on board the XYPN rocket ship, as I like to call it, I was a Content Manager. So I really had full ownership over XYPN content calendar. And at the time, largely I was creating freemium's I was managing our blog, our email, all of that. And that role eventually evolved into a Senior Communications Manager / Editor in Chief / the longest title of all time. (laughter) And in that role I took full ownership of our editorial calendar and all of our messaging. So this included things like our PR efforts. And then most recently, this past August, I became the Director of Brand Communications. And so this is now kind of like a hybrid Creative Director and Communications Director role. And I really feel like I've come full circle recently because I just hired an Associate Editor and she's starting tomorrow. And I really designed and model that role after my original role as Content Manager at XYPN. And so sort of here I am. I feel like I'm about to be training the next me (laughter).

Maddy Roche: [00:05:34] Yes. And that will happen again and again and again, as you stay at XY. I love your evolution here. It shows how nimble we are as a company, but also how important someone really taking ownership of the voice is as we define and continue our presence in this industry. I have so many questions for you about how XYPN's brand has changed over the years. And I'd be interested just hearing from you, Kelly, about your role currently. What does it really mean to to be kind of the master of the galaxy? What are what are some of the components of making sure that externally and internally we're telling the right stories?

Kelly Moorman: [00:06:11] Yeah. So one of the biggest things that I did when I first moved into the role as Director of Brand Communications was

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really take a step back and think about what the XYPN brand is and what we want it to become, because those are two different questions that you have to answer when you're thinking about brand, where you are today and where you want to go, you sort of always have to have an eye on the future, I think when you're in-in a brand role. And I really needed to do a lot of work to identify sort of the fundamental pieces of our brand that are always going to be core to it and inherent to it. So things like the fact that we are altruistic in nature, disruptive at our core, transparent, all of these things are really core to what XYPN is. And I knew that and I could articulate that. The question was, could everyone else on the team? And that's really important part of my role, right, is ensuring that brand consistency, because as our team continues to grow, there are a lot of different touch points for us. We have a lot of different people talking to different prospects, talking to different members, and we're all creating what should be a singular experience, and that is the XYPN brand. And so I had to put a lot of thought around what that really meant. And I developed a training around it and have been working with our graphic designer most recently to develop some resources around it, things like a brand guide, a style guide, that just gives other team members guidance for how we talk to XYPN members, XYPN prospects, just to make sure that we are painting a really universal picture, and not just that, but the picture we want. So, you know, the thing I like to tell people about a brand, a brand isn't just what you want it to be. Your brand really exists and in the minds of your customers. And so their perceptions, good or bad, are really what shape your brand. ,So it's sort of this is big moving, lots of moving parts to it. But really, like I said, I'm trying to ensure consistency really across our company as we grow and making sure we're communicating the message that we want to communicate so we can grow the movement the way we want to.

Maddy Roche: [00:08:21] Yeah, and those three words that you shared, I mean, disruptive, it's, I get goosebumps thinking about it because that is so

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our brand and it's so wonderful to have kind of a North Star like your brand guide to be able to train some new teammates around, how do we speak about XY? How do-how do you expect to be received once you are in XYPN teammate? It's very helpful, at least these internal resources you created for the team. But let's back up a little bit because you weren't always a professional marketer on a rocket ship. Let's go back to college days. What were you doing and what did you, who did you think you would be when you grew up?

Kelly Moorman: [00:08:56] I did not think I would be who I am today. I think that's a common for many people. But I am actually classically trained as a chemist, believe it or not. Yes. So undergraduate degree in chemistry and was pursuing a PhD in chemistry. So that was definitely the trajectory that I was on. Kind of caught up in the forward momentum there. Never really took a break to pause. It was something I was-I was good at. So I was like, well, that that makes sense. But I was a field researcher for a number of years, manage the analytical chemistry lab for a number of years, and ultimately did get a even a master's degree in land resources and environmental sciences, as well as a master's in public administration. So I was originally on this this very different trajectory to be a chemist. And I changed course. And I'm assuming you want to know why.

Maddy Roche: [00:09:49] I mean, if I could compare anything to the experience of working at XYPN, it's probably getting a PhD in chemistry. So I see other totally transferable. (laughter)

Kelly Moorman: [00:09:58] (laughter) Yeah. So what's really nice about this is there are a lot of transferable skills that I can-I can share with you. But really for me the problem was, like I said, I sort of get swept up in this

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forward momentum. I originally was a chemistry major. I just sort of finished my degree in chemistry and it was always something I was good at. And I did enjoy it, but it wasn't my passion and that was the problem. I never really took a step back to pause and ask myself, what is my passion, what drives me? What are the things keeping me up at night? And it was not questions of the nitrogen cycle and the phosphorous cycle. As interesting as those things are, those weren't the questions that were keeping me up at night. And my real passion throughout my whole life has been storytelling and writing and stories. And no one ever looked at me and said, hey, you know what helps you exercise those skills and turn that into a career other than being an author, marketing. I was never sort of introduced to marketing in a natural way. And so I sort of stumbled upon this career when my husband and I relocated to the Flathead after college. We had sort of taken a month off and backpacked around Nicaragua. I was a naive millennial who said I have two master's degrees. I'm going to have no trouble finding a job when I get back. Right. I mean, what else could I need besides two degrees (laughter) and a soul full of hope? But anyways, we ended up in the Flathead Valley and I ended up at a montessori school as a communications director, just super random. It was a job I found and I took at the time to sort of get by. And that introduced me to marketing and I haven't looked back since.

Maddy Roche: [00:11:45] Wow. Wow. And just for our listeners, the Flathead is-is part of Montana. So that's just to put some perspective and where you were finding your first job after what it sounds like a sabbatical, a bit, of your trip off.

Kelly Moorman: [00:11:58] It was a sabbatical. So as I mentioned, my boyfriend at the time, my now husband and I, after we graduated from grad school, we decided to backpack for a month around Nicaragua. He had

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never done much traveling. I, like I said, was so sort of wrapped up in school. I did. I went from college. Right. I went from high school and right through the four years of college and then to two master's degrees, never took a break and just wanted that time and that space away from academia. As much as I loved it, I just never had that break. And so, yeah, we went to Nicaragua and sort of just forgot everything and just had a blast exploring around. We had nothing but our-our backpacks that actually fit on our backs and we had a great time, it was one of the best things that I've done so, so thankful for that experience.

Maddy Roche: [00:12:52] Oh, that pause is so important. And it probably allowed you to pivot a bit easier into something like a communications position, given the break that you had from academia.

Kelly Moorman: [00:13:01] It did, because, like you said, it was a pause. And I had never taken that before in my entire life, which is it seems interesting to sort of reflect on that. But I was very much go, go, go very driven towards this sort of goal that I had set for myself without really understanding my own personal why at the time. And so when I finally stopped all of that and just had a lot of time to think and travel and just enjoy life and think about the things that matter to me and what I want, I realized, holy smokes, I don't want to be a chemist. This isn't what I want out of my life. And that's okay. Just because that was the path that I was on doesn't mean it's the path that I have to continue on. And that was really the first time in my life where I was okay with that.

Maddy Roche: [00:13:50] Right, right. And I loved what you said about momentum, because momentum is to me one of the most important things

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for me to to effectuate change with. But you want to be sure you're moving in the right direction?

Kelly Moorman: [00:14:01] Yes, exactly. It was forward momentum in the sense that I was I was moving towards the goal for further my career, but it wasn't going to take me somewhere where I wanted to end up, in terms of a passion standpoint. I could have been a successful chemist and I'm sure I would have enjoyed it at times, but it didn't fuel me. And that's huge.

Maddy Roche: [00:14:23] Yeah, I hear that. So go ahead and tell the listeners a bit about how you used your skills as a-as a classical chemist to apply the communication and brand strategy of a montessori school in Montana.

Kelly Moorman: [00:14:36] Yeah. So what is nice about science is, it is really analytical and data driven. And so I learned how to work with really large datasets at the time and how to see trends and patterns from the data, which is definitely transferable to marketing. I always say that I have a story to tell and then the data has a story to tell. What we-what we infer from the data is-is very much important. And so I certainly learned how to process those large amounts of data and like I said, really understand trends and what that means. And it gave me a strong appreciation for looking at problems and finding solutions from a really analytical standpoint. But the other piece of it is there is a lot of writing that you do in science. It's a huge part of science. It's a different style of writing. It's-it's a lot more technical. But I honed my skills as a writer throughout my entire college career and then my graduate career as well. It was a really big part of what I was doing. It was a huge part of what I enjoyed, too, about science. That was sort of where I really started to understand my love of

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storytelling, because a lot of the research that I did was focused on on climate change and how we can inspire action basically out of-out of the data. And so that's all transferable as well, because for me, I was realizing the importance of audience and understanding the story that you're trying to tell to elicit a certain response or reaction. And that's marketing in a nutshell, so.

Maddy Roche: [00:16:06] Yeah, and I think this is such a great example for our listeners to think about those of you who are career changers, who maybe don't have that formal education of being a financial planner, that there's so much to running a business, to branding the business, to selling the business to servicing your clients. That can really tap into some skills that we've-we've developed over the years and that each career that we've had, even before anyone pivots into this industry, can really be a meaningful value-add to the clients and to the success of your business.

Kelly Moorman: [00:16:36] Absolutely. That was what was really helpful for me, was to look back at sort of where I had been I had gotten to up until this point and say, what can I take from my experiences that I've had? What can I take from that and apply moving forward? Because it can be hard. I think when you change course to not feel like you wasted time. And as long as you learn something and you do take those transferable skills, it's not time wasted. I am the marketer that I am today because of my experience as a chemist. I have no doubt about that and I wouldn't change it. You know, there is another part that I'd love to expand upon a little bit, I did in my earlier days as a marketer sort of come up against impostor syndrome. I feel like almost every person has been on the podcast, has talked about this in some form or fashion. For me, it was because I did very much value education and my education had always been a really important part of my life. And I didn't have, of course, a marketing degree.

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And I got down on myself about that a lot. And I felt less than because I didn't have that classical marketing experience. And I, throughout my career, I had more and more conversations with really respected marketing professionals. One, I remember really distinctly. It was with the marketing director of Sims, the fishing brand here in Bozeman, and he has created some really beautiful marketing campaigns. I love Sims marketing. He's a really respected marketer and was having a conversation with him. And I, of course, assumed all the time that he was trained as a marketer and that's what he went to school for. And it finally just came up naturally. And I said, yeah, what do you have a degree in marketing? And he said, no, I have a degree in history and German studies. And I had more and more of these conversations throughout my career. And a common theme was that a lot of marketers did not have marketing degrees. And I asked I said, well, what-what is it? And we had this conversation, what is it that makes a marketer successful? And it really comes down to two things. It's passion and creativity. If you have those two things and you can marry it to one of your other strengths. For me, it's storytelling. You can be very successful in marketing without a degree.

Maddy Roche: [00:18:52] Can you expand on that a little bit about passion and curiosity and marrying it to one of your strengths? I love that.

Kelly Moorman: [00:18:58] Yes. So my entire life, I've been a very passionate person and a very curious person and a very creative person. And I think a lot of people look at marketing and they see that creative side, it's a huge part of it. You have to be willing to think outside the box. You have to be willing to ask questions. You have to have an inquisitive nature. And passion is so essential to marketing. Without it, you're inauthentic and people see right through it and you can't be successful in marketing. I strongly believe that, it's what allows you to flourish as a marketer. And so

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if you have those two things and then you have some other talent, we all have one. And mine happens to be storytelling. As long as you have that and you can pair it with whatever your strength is that you've identified, you're going to go very far.

Maddy Roche: [00:19:47] Let's talk about storytelling. How did you find out you were good at it? And what-what is it? Is it sitting around a campfire and telling a story?

Kelly Moorman: [00:19:56] Storytelling has all sorts of shapes and forms. That's certainly one example of it. (laughter) My husband has a great campfire storyteller, (laughter). Others of us, the written word is really where we tell our stories. But mine, my love of stories started at a very young age. I my parents tell the story of me teaching myself to read is a very, very young child because I love books. This was something that was just innate in me from a very young age. And one of my earliest memories was uncovering a dusty typewriter in our basement. I was very young. I was like six, seven maybe, and uncovering this and falling in love with this typewriter. And I used to just type stories on it as a young child. So I fell in love with storytelling from a very, very young age, and it always just existed throughout my life. I never really considered it as a career is just something I always loved. And I look back now and laugh, I say, if I had a dollar for every time a friend or a family member or coworker asked me to edit and wordsmith a piece of their writing, I'd be retired by now. Because I've been doing this since, I feel like I was like seven years old. (laughter) But yes, storytelling, like I said, it's different for every-every person. But for me, I think what makes me a good storyteller, honestly, I think it boils down to my empathy. I'm empathetic and I listen and I use every opportunity in life as a learning opportunity. And I think that's really served me well. And in

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storytelling is is my sense of empathy because I can connect with people on a really human level.

Maddy Roche: [00:21:38] I love this idea of authenticity. It's something that we talk a lot about. I'd be surprised if it's not a word you would use to describe XYPN, but it's something a lot of our advisors talk about, is that in our space, it's really important to be authentic. And I'm wondering, do you have tips for how advisors can tell an authentic story of their own?

Kelly Moorman: [00:22:00] I think they just have to really understand why and what they're trying to accomplish with their services. So when you're trying to be authentic, I think the best thing that you can do is sort of make a list of what you are and what you want and what you aren't and what you don't want. We hear this time and time again, but the best marketing isn't as much about talking to the right people as it is about repelling the wrong ones. And so many, I think advisors and business owners are afraid to repel any customers. But it's really important in marketing. You don't want to waste your time on the wrong people. You just, that's-it's so important to really identify who you are, what you want and what you don't want, you can't be everything to everyone or you'll end up being nothing to nobody. That's sort of one of those things that you hear all the time. And so authenticity, I think, really comes from understanding at its core what you want for yourself and for your firm and then staying true to that. And you hear this all the time. But don't try to be something that you're not. You know, use your own sort of conversational style for writing. If that's going to work for you, you're ultimately going to be the face of your firm as an adviser. So write the way that you talk that's going to work for you. That's fine.

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Maddy Roche: [00:23:29] Beautiful recommendations. I'm wondering for advisers who are targeting maybe a few niches or kind of a psychographic definition of ideal clients that maybe range a few different types. You at XYPN really have to market to a number of different personas, as we call it. I'd be interested in your advice around how do you tell a story that resonates and repels the right people, but speaks to a number of different types of people, if that makes sense.

Kelly Moorman: [00:23:58] Yeah. And so ultimately, when-when you're talking about this right now, I automatically think about of your brand hierarchy and your brand architecture. You mentioned, we're not only responsible for talking to different personas, that's-that's pretty typical. But we're also responsible as marketers at XYPN for marketing multiple service lines. And that can be really difficult. We don't just have XYPN core, which is our membership. We also have tax solutions and investment solutions and bookkeeping branch. And so there's a lot of different things going on at the same time and at play at the same time. And so I think if you're doing that and in that position, really, you need to build a brand architecture and know it like the back of your hand. So really understand the parallels and then the unique differentiators between what you're marketing and identify early on if you'll strike a different tone when talking about different service lines, for example, here at XYPN. And then remember and remind yourself that you're always aligning everything under one single brand so your tone can vary, but your voice needs to be consistent and that's essential. And for anyone who doesn't know, I'll just elaborate. Voice is just a unique way that a brand or a business communicates with the world. It's really the personality of your firm, if you're an adviser. It's the personality that comes through in your communications. The tone is the attitude of that messaging, you know, it's contextual. It's going to change based on the message that you're communicating and to whom you're communicating that message. And so that's sort of my biggest piece of advice is always remember, your

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voice is your north star. You want that to remain consistent. You can change your tone based on what you're marketing.

Maddy Roche: [00:25:41] Great advice, I'm wondering, Kelly, what about the people who struggle with writing, not all of us are writers.

Kelly Moorman: [00:25:47] Yes, that's okay. First, I would encourage them to read the book called Everybody Writes By Ann Handley. Yes, a book recommendation. I feel like you can't have a podcast without at least one of those. Right. This is sort of lauded as the go to guide for creating and publishing content that will make your business thrive. And if it's really centered around this idea that we live in this content driven world and in a world like that, everyone's a writer, in our words, our currency. And so it gives a lot of actionable advice, I think, for how to be a good writer, even if you don't feel like one. Really sort of what are those fundamental components that you need. So I definitely recommend that book, which again is called Everybody Writes. The second, tell yourself it's okay. It took me a really long time to realize that it's okay to not be the best or even good at everything. And in fact, it's impossible to be great at everything without sacrificing something. So if you're struggling because you aren't a great writer and it doesn't bring you joy, like that's okay. There is a time where you might say outsourcing or hiring an editor is an entirely appropriate solution for you if it's feasible. If it's not, my third piece of advice is that writing is like public speaking and the only way to get better at it is to do it again and again and again, even for someone like me who has made a career out of writing. If I take a hiatus, I feel rusty those first couple of drafts back at it. Writing is like a muscle that needs to be exercised regularly to be at its strongest. So just do it again and again. And then I guess a fourth piece would be, I strongly believe that reading is the key to being a good writer. You pick up on different styles. Your brain sort of

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intuitively recognizes good writing from bad writing. So if you want to be a better writer, my advice is to not just write more, but to read more.

Maddy Roche: [00:27:41] Oh, I love that I remember as a child, I didn't ever like reading, and I remember that being really made clear to me that I'll never learn how to write well if I'm not reading all the time. And it took me until my adult life that I fell in love with reading. I think a lot about our members, obviously on XYPN advisers, but also advisers that are not yet members and that are just part of this community and how badly they do want to differentiate themselves. And I'm wondering if you have tips about, I mean, it sounds like tone and your story could be your differentiator, but maybe just expand a bit. Some advisers come in not with the abundance mentality of feeling like there's enough clients for everyone. And so they struggle with feeling like they have to compete against the adviser down the road. Any tips on how to develop a story and a tone that works, that that's marketable and different than others?

Kelly Moorman: [00:28:29] The differentiation factor, I feel like comes up time and time again and choosing a niche or a niche at XYPN and not feeling like you're competing against other people. And it is really the best thing you can do is to sort of niche up and identify who you want to work with. So I think when you're trying to think about how to be authentic and different from your competitors, think about, of course, your target audience, who you want to work with, and then think about their their pain points and what those are, what their hopes are, what their wishes are. So this is coming back to developing those those client avatars. Right. Think about all of those things. Just think about them really channel who that ideal client is for you. Build that out and just speak directly to them. And when you do that, you're not worried about competing with the firm down the road or competing with this other-other firm across the country that

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you've noticed. You're not worried about competing with anybody. You're just worried about speaking to your ideal client. That's really what matters. You need to sort of have tunnel vision. I feel like when you're marketing and that tunnel vision needs to be focused at all times on your personas and your ideal clients that-that guides all of your marketing and that's how you really can be effective. So I don't know if that answered your question entirely.

Maddy Roche: [00:29:52] It certainly does. I'm wondering, Kelly, is there from your experience, is there things that people waste their time on? It just sounds like marketing has always been this pain point to any advisor who doesn't have a background in marketing. They just assume it's going to be hard. They assume they got to outsource it. Is there-is there immediate things you just know off the top of your head that don't waste your time doing it?

Kelly Moorman: [00:30:14] Yes. So the first thing I would say to not waste your time doing is producing super time-sensitive content doesn't have longevity. A lot of people defer to content and I think it's a great place to start. I am a full believer in the power of inbound marketing and creating content. Content is king in this world, but it takes time. And so if you're constantly creating time sensitive content that doesn't have longevity, you're going to be wasting time. You want to create content that's going to be evergreen and keep working for you. It's going to work as much for you as you worked for it originally. You know, of course, the caveat there is- there is going to be times where you need to seize the moment and take on a super relevant topic that's fleeting, like whatever the heck happened with GameStop. Right. You're going to want to address that. But by and large, don't waste your time writing content that's time sensitive because you do want it to have longevity and keep working for you long after you've put the

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time into write it. So, that would be one thing that I would-I would avoid. I would also say and this isn't so much some sort of strategy to avoid or a specific tactic to avoid. But remember that if you are going to employ any sort of marketing tactics before you pull the trigger, you need to make sure first how you're going to track the effectiveness of those efforts. Metrics are absolutely everything in marketing. And I spoke about this a little bit before when I said my familiarity with working with large sets of data has served me very well. Your data, your metrics, your KPIs key performance indicators, this is how you know what's working and what's not. And that's how you can make sure you're spending your time and your money on things that matter and will actually move the needle and convert those prospects to clients. So measuring is such a key part. Marketing really is-is nothing without measurement.

Maddy Roche: [00:32:03] I would love to know what are some of the KPIs and things that we track here at XYPN that are meaningful to-to you and your team?

Kelly Moorman: [00:32:10] Yeah, there's a handful and it obviously varies from team member to team member. I can talk a little bit about it from a content perspective. We, of course, track things like not just the views that we get on our blogs, but every one of our blogs is attached to a lead magnet. So that's another key. You want to make sure you have some gated content places to capture email addresses on your website so you can actually build a list that you can nurture, but we attract where we track the conversion rates that are associated with each of those lead magnets, so how they're converting. How many people actually see a pop up and then actually decide to download it and give us their email, so that's really big. We track the size of our prospect list and what the growth of that list looks like. It's a big key performance indicator for us. That's top of the

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funnel. You know, that's where we're actually drawing our-our MQLs, marketing qualified leads, from, our sales qualified leads from. So tracking the growth of your prospect list. If you do have email capture and a list that you're growing that you can market to the really big one. And then, of course, we go all the way down to the bottom of the funnel. Sales and marketing work in lockstep at XY Planning Network. And so how many of those marketing qualified leads are actually converting into members? That's-that's huge. So for an advisor that would be tracking a lead all the way from becoming sort of marketing qualified to becoming an actual client. What are those conversion rates look like?

Maddy Roche: [00:33:40] Great. What-what percentage of your time do you think you're spending, looking at the data, analyzing and making strategic decisions around it.

Kelly Moorman: [00:33:51] Oh man, a percentage of time is such a hard question to answer. Not enough. (laughter) I would say, the take away would be you always should spend more looking at the data than than you think. But Maddy, as you know, I think this has probably been mentioned on a podcast before, but we use the EOS system here at XYPN. So the entrepreneurial operating system and through that we have what's called an L10 meeting every single week. And so this sort of kicks off our weeks. We have them on Tuesday. And one of the very first things you do after you do what's called the segue, as you look at a score card, and that's the main KPIs for each team across XYPN. And so we're looking at that on a weekly, excuse me, weekly basis and dissecting that score card and essentially the metrics that are captured on that score card. We like to say if Alan, XYPN's CEO, is stranded on a desert island, you could give him the score card and he can really know if XYPN was going to be okay or not. So these are our key performance indicators. They're huge. I mean, we look at

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those every single week as a team, so we all have a pulse on it. So I know I can answer your question about approximation of time, but quite a bit. And you could always use more time looking at data.

Maddy Roche: [00:35:04] Yeah, and I've loved as we've developed professionally at XYPN, we've been encouraged to tell the story of our data and it's something I work with my team to do as they do different data reports. Tell me the story. What is it telling you? Is that tied into kind of your idea of stories as well?

Kelly Moorman: [00:35:20] It absolutely is. And I think I might have mentioned this earlier, but I said we all have our own stories to tell of marketers and then the data has its own story to tell. Of course, it's great when those are in corroboration and they should be. But I do-I do think there's always a story to be told from the data. And for us, that's really the story of our marketing funnel. So it's really fun for us to look at. Right, because it's all of these things that happen at the very top. So how we're attracting customers to us. I mentioned before we use a largely inbound marketing strategy. So we're all about attracting people to us. We're not going out to interrupting people and grabbing their attention where we're trying to create content that draws them in. And so our data is really holistic and comprehensive picture of what that looks like from the top, where they're first attracted to XYPN and they're learning about us and they're poking around the website to when they get pulled in a little bit deeper into the funnel and they're actually attending a webinar or a free webinar as a conversion point of ours, downloading a member benefits directory. So engaging with some of our content in a more meaningful way. And they're getting pulled deeper into the funnel. And you can look at the conversion metrics around that and then eventually they decide, hey, I'm ready to talk to your sales team. I got to know a little bit more. And so that's another

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conversion point that you're tracking there. And then after they have that call with sales, hopefully they're eventually becoming a member because once someone hears about XYPN from a member of our sales team, it's-it's a hard story to walk away from.

Maddy Roche: [00:36:57] I talk to-to the new teammates to join XYPN that it really takes a number of things to happen personally and professionally to find yourself at the at the application of XY. And that's I think what makes our community so wonderful is that the folks are ready to be here, ready to do this kind of work. And our story along the way has helped them feel confident enough that once once they're ready to join XY, they're ready to start their firms.

Kelly Moorman: [00:37:19] Absolutely. That confidence is key. It is a big decision. Like you said, Maddy membership. Becoming a member of XYPN is not a decision that anyone takes lightly. And it's interesting because you mentioned this earlier, we do have different sort of personas and different paths that people take to get to XYPN. And based on where they are in their career, it's going to take someone who doesn't yet have a firm who maybe a career changer, transitioning from a completely different field, going to take them a lot longer to actually be ready to fill out an application with XYPN versus someone who's established and already has a firm and says, hey, I'm just looking to save a little bit of money on my technology. And XYPN can help me do that, among other things. They are going to be able to fill out that application a lot quicker. And so, again, that's also the story that the data is telling, because we have these personas identified and we can look at the life cycle of a customer and of our personas and look at sort of the data and understand how long it takes different people to sort of move through that funnel.

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Maddy Roche: [00:38:20] Mm hmm. Mm hmm. It's so interesting to draw those parallels between what we do at XYPN and what the advisor members are doing, too. And this idea of inbound and getting them interested versus interrupting them is something I hadn't really thought about. And could you walk us through a little bit more about what that funnel looks like and maybe in the language of what an advisor would be looking at for their business?

Kelly Moorman: [00:38:42] Yeah, and so, like I had mentioned before, is sort of the top of the inbound funnel, is that awareness stage where you're really you're creating content. That's a huge part of the inbound marketing strategy, right. Is you're creating this content, attracting customers by creating valuable content and experiences that are tailored to them. That's really the biggest difference between inbound and outbound. Outbound is sort of interrupting your audience with content they don't always want, inbound is about forming those connections, people are actually looking for solving problems they already have. So in general, just like the parallel between financial advising and inbound marketing, I think is so amazing because financial planning is helping profession at heart. And I just think it pairs so well with inbound marketing because inbound marketing is all about helping people. So I love I love inbound marketing as a strategy for financial advisors because I feel like it just makes sense. But if you're sort of looking at that that funnel, you know, the top stage, those people are strangers to you at that point. Right. And so it's all about attracting the visitors to you. So these are tools you can use, like a blog, social media to increase brand awareness, the keywords that you're using on your website. So the sort of SEO strategy, all of those sort of things come to play at the very high level. So it's-it's who you want to draw into your firm's universe, if that-if that makes sense. And then your next-your next stage, you're going to sort of move to the middle of the funnel. And this is about the conversion points that I talked about. So converting those prospective clients, those people who sort of poking around your firm's website, trying to decide if

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you're the financial planner for them, this is an opportunity for them to convert. So this is you're doing this to your calls to action and you might have a lead magnet as a financial planner that walks down, walks through the five top tips for investing something like that. It could be something super simple or five tips for a new homeowner or home buyer looking to buy their first home, something like that. So that middle of the funnel you're converting, the visitors calls to action landing pages, forms, things like that. And then you're going to move down to the bottom of the funnel, like I talked about, where you're actually closing and hopefully converting those leads into clients. And this is where you're doing things like they're scheduling a call with you as a financial advisor, sort of like a discovery call, an introductory call to see if you're the right fit for them. So that's where you actually have the opportunity to sort of close the deal. So that's an example of what that might look like for a financial advisor.

Maddy Roche: [00:41:19] Beautiful. And our marketing coach, although I'm sure folks are taking notes during this podcast. We do have a marketing coach at YYPN that does talk a lot about the funnel and helps through the Growth Workshop really refine that. I started thinking, Kelly, as you were talking, that marketing isn't something that you just kind of do with the start and you turn off. It really is this ongoing iteration process, is that right?

Kelly Moorman: [00:41:43] That's absolutely right. It is not, is very rarely a set it and forget it. There are certain marketing tactics, tactics that can be sort of set it and forget it like a nurture campaign, for example, that you create a drip campaign where you create the email content and you said and you monitor it and if it's performing well. But by and large, marketing is iterative. You're always making it better. You're always refining. You're always going back to the data and saying, hey, I noticed this conversion point dipped off. Something where we were doing that was working is no

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longer working. It needs to be modified. Something else that I think is worth mentioning here is your personas can change over time. That doesn't necessarily mean that your your niche is changing just your marketing to people, to human beings. And people change over time. And that's-that's okay. And so I sort of think of most recently with a pandemic, there were some really big shifts for marketers in terms of their personas. We had XYPN developed a whole set of crisis personas because pain points changed for people amid the pandemic, there were layoffs that were happening that were causing some people to be in a position where they're wanting to start their firms sooner than they thought they might have been ready. And then there are, of course, other people who were getting ready to jump in and make the leap to becoming a firm owner. And there's nothing like a pandemic to convince someone that it is not the right time to leave your steady job. So we had these crisis personas and we had to shift our messaging a little bit because of the pandemic. And so it is always iterative. I'm very glad that you said that because it's a never ending process. You really need to make sure that you're constantly sort of speaking to the pain points in the hopes and the goals of your target audience. And those things can change over time.

Maddy Roche: [00:43:28] Mm hmm. And your passion around how you market, I think could change over time. Folks that have really established a great email marketing list that they've-they've cultivated for a while may find that a podcast is really the best medium to reach their folks, or if a blog is highly read that they continue to write. I feel that I see a shift with members that as their firms advance kind of their approach to marketing advances a bit, they really refine it to being the medium or the type that works the best for them and their firm. And to remain open about that, I think is a really good thing we can encourage advisors to think about as they evolve their firms.

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Kelly Moorman: [00:44:04] I, I couldn't agree more. It's such an interesting mix and kind of a fine line, too, between what works best for you as a firm owner, marketing your firm and what works best for your target clients. Right. And you have to think of both sides of that equation for it to really add up and make sense. So I say that just because I like to remind people that just because Facebook is your preferred social channel, if it's not the preferred social channel of your target market, you're going to be out there talking to no one, not the people you want to be talking to. So you do want to keep that in mind. You have to do things, of course, that bring you joy in that you know you're good at. But you also do need to always be mindful. I just keep going back to that target audience. You need to understand where they are and meet them there. You're the one who's doing the work to meet them. You don't want to make them to do the work to meet you.

Maddy Roche: [00:45:03] Totally. I'm really interested Kelly, you said you were an avid reader. You've already given a shout out to a great book. Everyone can Write. Other books that you think would be worth it for some advisors to listen to or read?

Kelly Moorman: [00:45:18] I do really like the book Building a Story Brand by Donald Miller. So this really explains the key elements of powerful stories and it helps you transform the way you talk about who you are, what you really do, the unique value you bring to your customers or prospective clients. So it helps you understand and create and hone a simple brand message to create persuasive messaging and and ultimately a powerful presence. So I do recommend that book. I, Maddy, Building Brand Communities, I actually have it with me right now. You had recommended this book and I grabbed it from the XYPN library. This all about how organizations succeed by creating belonging. I've been finding this to be really interesting and applicable about creating meaningful connections.

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We talked a lot about authenticity because authenticity is really, I think, the key to building a powerful brand. So that's-that's what that book is all about, Building Brand Communities. And those are some of the professional books. I am an avid reader. I prefer fiction. I can give you fiction recommendations if anyone wants those books.

Maddy Roche: [00:46:30] Yeah, that book Building Brand Communities would actually be a great book for members to read, generally. There's as you kind of cultivate the community of your clients that the author is Carrie Jones, who actually helped us. She's a consultant that we met a few years ago that helped us transition our forum platform. She's a forum community expert and really has some deep theory around how to cultivate a brand tone. I'm so glad that you consider that a book for-for your space as well.

Kelly Moorman: [00:46:58] Yeah, it's one like I said, I just recently grabbed. And so it's-it's top of mind for me and I've been enjoying it. And then, yeah, like I said, Building a Story Brand I think is a really great read. It's also a great, I had both the hard copy of it and I have it on audio book and it's also a great read over audio. So yeah.

Maddy Roche: [00:47:17] Awesome. I'm interested, Kelly, as you know, so much of your job requires creativity, it requires space, it requires time. And I imagine that's something those are all finite amounts of things that are advisers have access to. And I'm wondering in the world of COVID, if you have any tips on if folks are stuck at home, if they've got kids, if they've got competing. Ideas and priorities. How do you-how do you carve out time to still be creative and foster that?

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Kelly Moorman: [00:47:45] Yeah, I think for me it's-it's such a good question and it's an interesting one. Like you said, in light of COVID and trying to stay creative, nothing is better for my creativity personally than good conversation. And I feel like that's the same for a lot of people. And so I would try to prioritize having at least one good conversation a day, even if it's with yourself. And I say that because I've had plenty of good conversations with myself where I just sit with my own thoughts and I'm introspective and I actually have like a two sided conversations that are thinking through different problems. But it's also really helpful if if you're not able to get out of the house, get someone on the phone who you feel comfortable talking to and have that really good conversation. It's so good for the soul. And then this other piece is going to feel really uninspired. But it's honestly, I cannot overstate the importance of it. I get outside every single day, even if it is just for a walk. Taking a walk in nature has been shown to boost creativity. It boosts your overall mental, physical, emotional well-being. It is absolutely essential, I think, to creativity getting outside. So I like I said, I know it's uninspired, but it's those are those things are the most powerful for me for staying creative is making sure I've had at least one good conversation in a day. And I've got outside and and I've gotten outside. And that's-that's what I need to be at my best creatively.

Maddy Roche: [00:49:12] Those are such beautiful tips, Kelly. And you heard it here first. I just I've never thought that you can think about your day and say, did I have a really meaningful, heartfelt conversation with someone? I don't think I've ever asked myself that question.

Kelly Moorman: [00:49:27] It's-it's-it's going to be interesting moving forward Maddy to see what you take away from that. We'll have to circle back together and see (laughter).

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Maddy Roche: [00:49:36] Well I'm going to count this one. As far as that conversation today, Kelly, any time I chat with you, I learned so much. I really hope our listeners have found some-some real nuggets of wisdom in your conversation about how you built brand over the year, over the years and how you've told the XYPN story as well as many others. Kelly, any last-last minute thoughts for our listeners about as they venture into the world of being marketers, along with chief compliance officers, along with chief sales officers, all those good positions that being a business owner kind of is inherent with, any tips?

Kelly Moorman: [00:50:08] I think my biggest tip would just be to remember to lead your life with with empathy and remember to connect with other people. I have reflected a lot, I think amid the pandemic, particularly the past year, just about our sense of community and our sense of place in this world that is interconnected. And just remember, we're all-we're all humans working together on one planet. So just lead your life with that connection and trying to connect with others.

Maddy Roche: [00:50:38] Thank you, Kelly. That's wonderful, listeners. I hope you enjoyed this. Kelly, thank you so much for being on #XYPNRadio.

Kelly Moorman: [00:50:46] Thank you, Maddy. I had a great time.

Maddy Roche: [00:50:51] Avocado toast, selfies, a mountain of student loan debt. Gen Y is anything but traditional, and with over seventy five million people, it's a population you don't want to ignore. Learn more about how to serve this unique population in our guide called Attract and Profitably Serve Millennial clients in your RIA. Discover three key ways to

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Maddy Roche: [00:51:26] Be sure to join our VIP community at XYPlanningNetwork.com/VIP to hang out with other #XYPNRadio listeners, ask questions for future mailbag episodes, and finally to find a community of like-minded financial advisors. Thank you so much for joining me today. We'll see you next time.

Narrator: [00:51:42] You are not alone and you are not crazy is scary starting, building, and growing your own financial planning firm. And that's why we put together a free private community just for you, the cutting edge financial planner. Go to XYPlanningNetwork.com/VIP or text #XYPNRadio to 33344 and join a network of thousands ready to change the lives of Gen X and Gen Y clients.