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Finding Gold

Psychological Analysis of Your Marketing

By *Michael Lovas*
September 1, 2009

Over the years, I've performed a rather rare service - a psychological analysis of marketing material. Doesn't it make sense? After all, your marketing is a written representation of you, your persona, your psychological health. It doesn't take many internal blunders to show your persona as sociopathic and your psychological health comparable to Hannibal Lector.

After analyzing marketing for many years, I easily see the most common errors. In fact, I see them in nearly ever piece of marketing in the insurance and financial industry. Does your marketing contain these problems? Probably. But, let's take a look at what the common problems are. Then, you can lie back on the couch and we can talk about it.

We use a two-step analytical process.

Step One is based on first impressions. What message is explicit, and which are implied. What is the personality of the firm and spokesperson? For example, if you say you only work with a select group of HNW families, but your marketing is printed on your office ink jet on photocopy paper - well, you just gave the first impression of someone who is either confused or reaching.

Step Two is based on the Mental Filters used in the communication. Are they the right ones? And, if not, what mental filters would likely be more effective? I know of no one producing marketing who uses Mental Filters purposefully. So, they're being used inadvertently, without control. Imagine you're at the shooting range and you're going to fire a few rounds from your 22 caliber rifle. But, instead, you inadvertently grab a grenade launcher and aim at the wrong target. Oops. That's what happens when you use the wrong Mental Filters.

Note: Mental Filters are the automatic and unconscious filtering devices at work in everyone's mind. There are approximately sixty of them. When you understand which Filters are being used by your target audience, you can then appeal to those filters. If you don't understand this aspect of psychology, you risk miscommunicating with your target market.

Brochures

Next to the business card, the most common marketing piece is the brochure. Across the entire industry, brochures are dismal. Thus, this article will focus on the psychological problems found in most industry brochures.

First Impressions. Every time you look or glance at something new, your brain spends less than one second to make a judgment of it. That's the first impression. The style of the design, quality of the photos and the type face all blend together to make a statement. In the financial industry, brochures make only a few different first-impression statements. They're either: quick and cheap; stoic and boring; ego-maniacal.

Quick and Cheap. This is the tri-fold that you have duplicated on your office printer, or have pumped out at Staples. They're on cheap, letter-size paper and have the tactical feel that's a few steps below a drivers license renewal notice. For some reason, they are most often found in the insurance industry.

The design and images are dark, indistinct (because of the duplication process), and the type face is whatever the computer's default says it is. This is a marketing piece that does more harm than good. They're like bib overalls at a big church wedding. The statement it makes is, "We don't want to waste money on you." They make the firm look like amateurs who operate out of a salvage yard.

Stoic and Boring. This is a rather expensive piece that is printed on rather expensive paper at a rather reputable printing firm. It's usually created in-house or by an ad agency. The images are excellent and the type face modern. Sounds good, right? The problem is, all the elements add up make the statement that the firm and its directors are detached from you. The impression is that they might take your money, but they don't really want to deal with you at a personal level. This would be more appropriate as a B2B piece than a B2C piece.

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Ego-maniacal. There is something to be said for "star power." That's the charisma of someone who easily causes heads to turn every where he/she goes. Insurance agents and financial advisors rarely ever have star power. Nonetheless, there are many advisors who want people to see them as stars. And, their marketing is based entirely on how fabulous they believe they are.

The images are passable (all of the star). The type face is readable. The printing quality is acceptable. But, the impression is that all roads lead to this person, and no matter how much money you give to him/her, you will never be an equal or even a valued cog in his/her wheel. These pieces truly are the porn of the financial world.

They are mainly produced by a few ad agencies who specialize in this type of marketing. We are often sent this type of piece and asked to comment on it. There is only one thing to say. They completely and totally miss the point of marketing. Therefore, the results from them will be predictably terrible.

Content

The content is the result of a copywriter. And, that's where the first mistake occurs. The copywriting - even when it's competent - is off-target, because marketing writing is an application of communication psychology, and copywriters do not understand it. I've worked with many ad agencies and in-house marketing departments over the years, and I've never met a single writer knew the first thing about communication psychology. As a result, we see the following problems over and over:

1. **Focus:** They focus far more on *we* than on *you*. For example: "We look at financial security as a package...Our investment philosophy is..." Rather than, "You get the maximum financial security when you take a comprehensive approach."
2. **Verbs:** Nearly ever brochure we see is written in a passive voice. So, rather than give a mental picture of the reader taking action, they give a mental picture of the reader taking no action. This creates confusion and invites people to well, take no action.
3. **Psychological process:** This is a fundamental that's as important to marketing as the alphabet is to wording. Insurance and financial people love to expound on *how* they do their work. That's where they dive first. Thing is, their prospects generally don't care. The readers and prospects want to know *why* they should pay attention. In other words, the marketing places the cart miles in front of the horse. That causes confusion. The best way to get a reader involved is to name his/her problem. When you name my problem, I immediately get interested. That's the key. It addresses the *why* question and engages the reader so the marketing can address the other questions.

Mental Filters

Remember, Mental Filters are the automatic and unconscious filtering devices at work in everyone's mind. When you understand which Filters are being used by your target market, you can then appeal to those filters. Thus, more of your message will get read. Failing to use the right Mental Filters is like fishing with a net, but not spreading it. Here are the three most common Mental Filters blunders found in insurance/financial marketing:

1. **Thing** - This filter is represented by language that treats readers, prospects and clients like cogs in a wheel, mere tools - like things, rather than people. You can spot this filter every time you see reference to, "the individual ... the investor ... the client ... the electorate ...the deceased."
2. **Internal** - Count the number of times you find *We* or *I* or the firm's name in the marketing. Then, count the number of times the word *You* is used. That gives you an indication of the real target market. More often than not, the marketing is written to the person it represents. An Internal Mental Filter says, "I make my own decisions and I don't really care about you."
3. **Rules** - There is one over-riding psychological rule inside everyone's head. The rule is simply expressed as *My/Your* or *My/My*. The *My/Your* rule says, "My rules for me/Your rules for you." The advisor would be compelled to ask the client what he/she wanted to accomplish. The *My/My* rule says, "My rules for me/My rules for you, too." The advisor would be saying, "I don't work with clients unless they give me all of their assets. That's a rule. And, I will manage them all for you."

In Conclusion

If you want to improve the results from your marketing, you have to improve the psychology. And, you'll gain a distinct advantage when you begin to apply the information contained here to your marketing messages. There are about 60 Mental Filters. The more you know about them, the better results you will get from your marketing and your selling. This is simply how all people filter in-coming information. If you apply the wrong filters, you will be aiming at the wrong target. So, you'll attract people you don't want, or you won't attract anyone.

Your Reward. How well does your marketing work for you? How well does it represent you? Does it establish you as a credible professional or something else? If you want to get our objective review and analysis of your marketing, just let me know. I will personally perform a review and analysis on one marketing piece (one page) for \$100. That's 1/3 the normal fee. Aren't Rewards fun?

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Michael speaks at conferences and seminars in Canada and the US. He is an inspiring trainer and coach who helps advisors improve their businesses. He holds three prestigious certifications: Licensed Master Practitioner of Neuro-linguistic Programming (NLP), Licensed Trainer of NLP; and Clinical Hypnotherapist. They make Michael an expert at helping financial professionals succeed at a higher level by building more meaningful business relationships.

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