

A group of five business professionals (three men and two women) are gathered around a table, looking at documents and smiling. They are dressed in business attire. The background is a modern office interior with a geometric, metallic structure.

# Mini-Guide to Mapping Content to the Financial Services Buyer's Journey

**SmartBug.**

# Table of Contents

Introduction ..... 3

Back to Fundamentals: Content and Conversion ..... 4

Understanding Your Buyer Personas ..... 6

What Is the Logical Path That the Buyer Persona  
Will Take Through the Buyer’s Journey? ..... 7

Troubleshooting Your Content Library ..... 12

About SmartBug™ ..... 14

# Introduction

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When creating a content marketing plan for a financial services company, is mapping content to each of your individual personas really necessary? If you're already dividing your content by stages of the Buyer's Journey, then also creating separate content for your buyer personas—such as Small Business Sam and Executive Ethan and Evelyn—can seem like time-consuming, unnecessary work.

However, this couldn't be further from the truth. Each buyer persona has unique triggers that cause them to look for a solution, as well as different features they're evaluating during the buying process. The financial industry is complex and multifaceted, which means there are a wide variety of potential buyer personas. If you're not mapping content to each of your buyer personas, you're likely misrepresenting marketing content to your intended audience.

A woman with dark hair, wearing a patterned top and large earrings, is smiling and gesturing with her hands in a meeting. She is looking towards a man whose back is to the camera. The setting appears to be a conference room with a wooden table and a glass of water.

## Back to Fundamentals: Content and Conversion

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Every piece of content you create and distribute should be designed to meet a need felt by the viewer. When you place a piece of content behind a gate such as a form or landing page, you're essentially proposing a transaction: The viewer provides something of value (name, email address, phone number, and so on) and gains something of value (the answer to a specific question, concern, or desire he or she has). When this transaction concludes successfully, we call it a conversion.

The best way to generate conversions is by promising something of value. However, like any business relationship, delivering on the promises you make is critical. Content that underdelivers on this exchange will damage your trust and credibility—and replace interest with skepticism. Trust is essential in the world of financial services, and it also extends to the quality of content you're putting out.

You can build trust by better understanding your buyer personas and what kind of content is most valuable to each. For example, an interactive savings timeline would be intriguing to a 30-something worried about staying on track for retirement, but less appealing to a young professional or retiree. Creating buyer personas helps you understand and internalize the needs of each type of person likely to need your services.

This process of understanding, identifying, and organizing is what we call content mapping, and when successful, it helps ensure that you always offer the right content to the right person at the right time—thus maximizing your opportunity for a successful conversion.



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# Understanding Your Buyer Personas

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Take a look at the sample personas included in this kit. You'll notice that each meet these key criteria; the buyer personas that you develop should do the same.

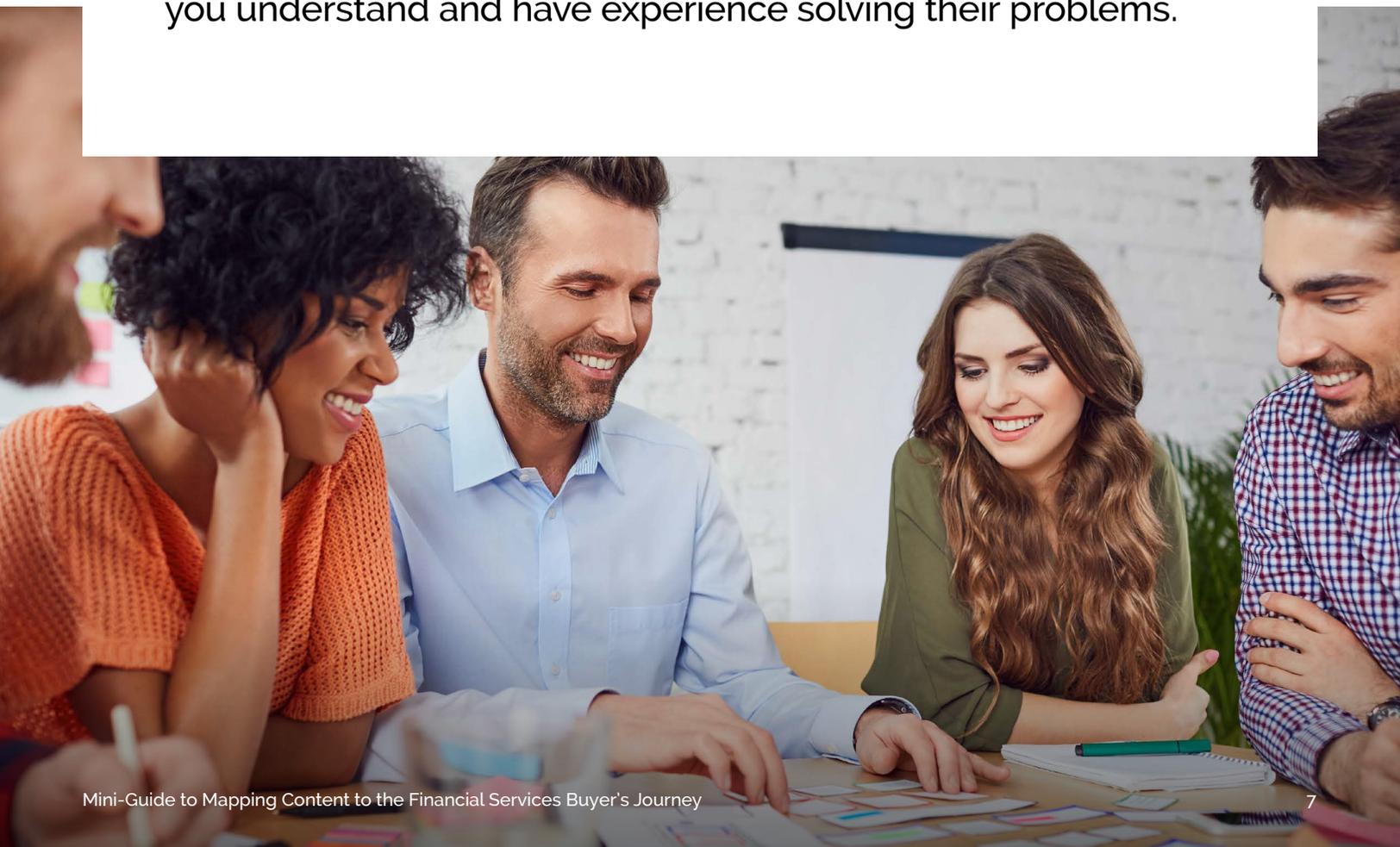
- 1. Current:** Personas should be reviewed and revised periodically to keep up with the latest research and trends of the financial industry.
- 2. Data-driven:** Your buyer personas should always be based on facts. Are you basing personas on guesswork or actual data and conversations?
- 3. Ideal:** This doesn't mean the perfect buyer you imagine in your daydreams, but rather a buyer whom you can provide something of value to and will be important to your company.
- 4. Fictionalized:** Although the buyer persona should always be based on facts, each should be a fictionalized representation of an ideal customer and not a real person.

Once you have a proper understanding of your personas, you can begin to consider them in the context of their Buyer's Journeys. This means the types of content and offers they are likely to be interested will change as they progress through the awareness, consideration, and decision stages.

# What Is the Logical Path That the Buyer Persona Will Take Through the Buyer's Journey?

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Each Buyer's Journey begins with a felt need—a symptom of a problem. Your financial services business is there to help people solve these problems. Unfortunately for you, people who are not already familiar with you and your business may not initially see your company as the best solution. How do you convince them? Meet them where they are, and show them that you understand and have experience solving their problems.





## Who Is Asking?

Which buyer persona are you mapping content for? You can choose one and work all the way through the Buyer's Journey, or you can choose a Buyer's Journey stage and evaluate it for each persona.

A C-level executive's challenges and pain points will be vastly different than a widow who is newly in charge of estate planning. Knowing who is asking for content will help you evaluate it for appropriate tone, language, examples, level, and depth of information.

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## What Is Bothering Them?

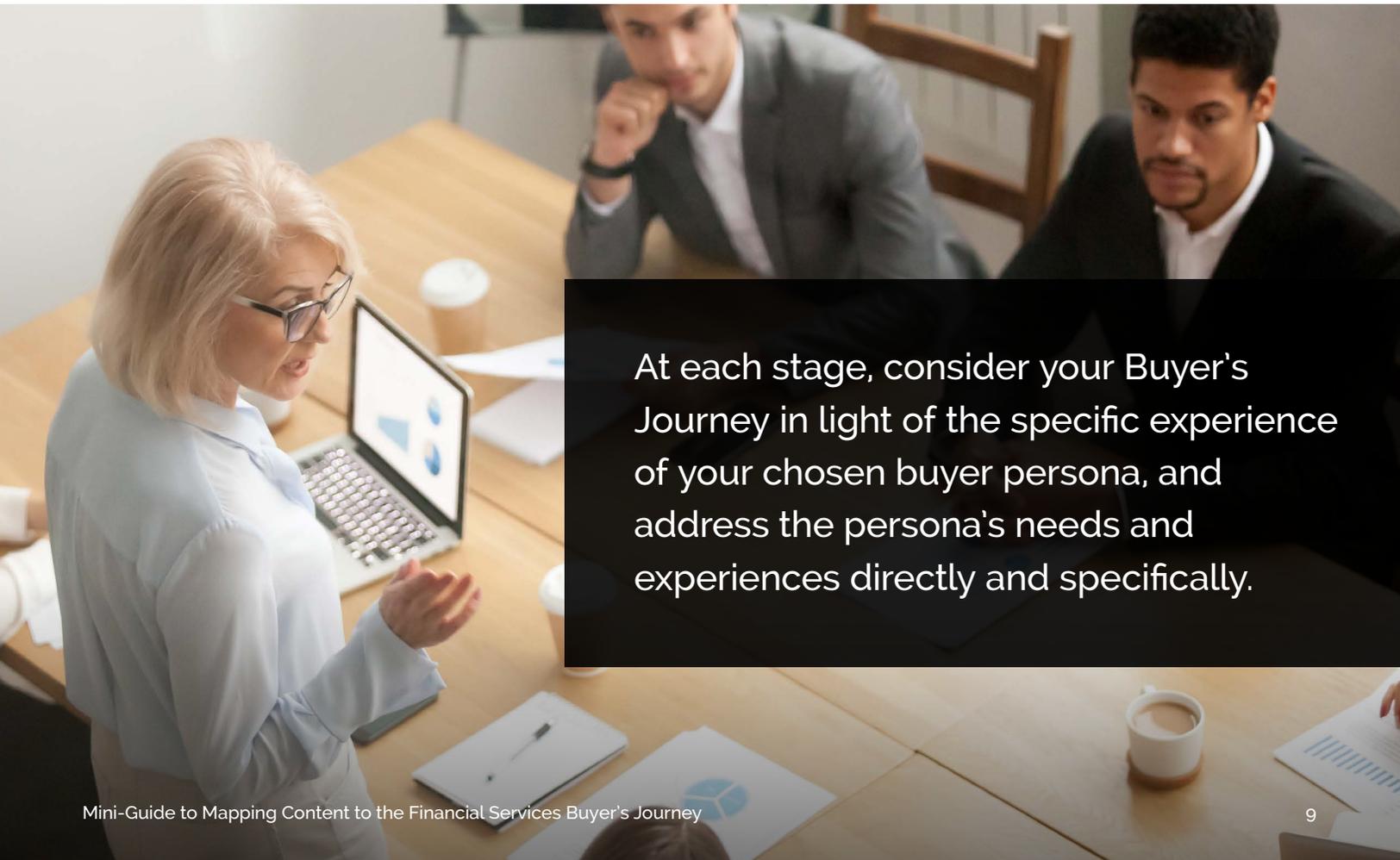
What is really making this problem painful for your persona? Remember, the **symptoms** of a problem may look different from the cause. An eye doctor doesn't treat headaches, but headaches can be a symptom of a problem with eyes. Help your personas identify where their problems are coming from.

- To create and map **awareness stage** content, identify a symptom that is affecting your specific persona directly. Create content that helps your persona recognize and define the problem.

- To create and map **consideration stage** content, build an argument that explains why your solution is best for the persona-specific problems and symptoms you identified in the awareness stage.
- To create and map **decision stage** content, provide examples, data, and details that support your financial services as being the best possible solution—the one that solves your persona's problems.



## What is really making this problem painful for your persona?



At each stage, consider your Buyer's Journey in light of the specific experience of your chosen buyer persona, and address the persona's needs and experiences directly and specifically.



## What Questions Are They Asking?

Consider the questions that your personas are asking. Whether you find those questions in focus groups, on LinkedIn or other social media, or in conversations with existing clients, make a point of understanding what your buyer personas want to know.

Every time you map a piece of content, make sure it answers at least one these questions and that the question is relevant to the persona you are targeting. Together, your buyer personas and the questions they're asking should reveal what topics you need to cover in your content strategy. Listen to them!

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## Where Do They Ask Their Questions?

One-size-fits-all is rarely, if ever, a good approach to distributing your marketing content. When you plan what to write and how to promote it, consider where your target personas get their information. A vice president of sales at a multinational technology firm may spend an hour or more on LinkedIn every day but rarely uses Facebook or Instagram.

When you select, produce, or distribute content, your buyer persona should inform the format you choose. The format must make sense for the platform, and the platform must be one that your buyer persona is already likely to trust.



## When Are They Asking?

Two different personas may (and often will) ask the same questions about your product or the problem they are experiencing. However, they do not always ask these questions at the same point in their Buyer's Journeys.

If one of your buyer personas has no previous experience with the services you offer and another has already worked with a competitor and is thinking about making a change, they will likely ask you questions that sound familiar. However, one is asking in need of general education (awareness stage) and another is asking to determine if you'll be able to meet their requirements (decision stage).

Remember, sometimes the same question will require different answers. Knowing when each persona will ask a certain question is key to answering it the right way.

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## How Do They Search?

Once you have identified the content, the Buyer's Journey stage, and the format and language that will make sense to your persona, you should optimize content for the persona to find.

How you format and word a title, landing page, email, call to action, or even a list of keywords can be informed by the habits, experiences, and preferences of the buyer persona. Your content should be optimized for the way that your persona will search for it.



# Troubleshooting Your Content Library

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Finally, here are some additional troubleshooting questions to ask when mapping content in your library or editorial calendar.

## Is It Clear **Which Persona** This Content Is For?

Each piece of content should target one persona. If you have existing content that seems to be appropriate for several personas, consider splitting it into separate pieces that are more specifically targeted.

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## Is It Clear **Which Stage** This Content Is For?

Can you clearly identify where the content will lie on the continuum of the Buyer's Journey? If you are confused about who should read it, you can bet that your website visitors will be confused as well and, ultimately, be dissatisfied.

## Is It Clear **What Strategy** This Content Promotes?

Remember that with each piece of content you distribute, you are building an argument that leads to a logical conclusion. Does this piece of content clearly contribute to the argument you are making for a specific persona?

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## Is This Type of Content **Necessary** Right Now?

When you are trying to decide what kind of content to add, remove, or change, start by filling in gaps and covering weaknesses. Which buyer persona or stage of the Buyer's Journey are you lacking in the most?

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## Is This Content on the **Right Platform**?

Are you sharing long-form text posts on Facebook? Posting memes or 140-word quips on your blog? Sharing photos with professional LinkedIn groups? Make sure that you are putting your content on appropriate platforms.

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## Do You Have a **Plan** to Move Forward?

Unfortunately, some B2B and B2C marketers have not documented a content strategy, thus producing content with no plan in mind. You wouldn't leave the rest of your business to chance; don't do it with your marketing.

# About SmartBug™

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SmartBug Media™ is a globally recognized Intelligent Inbound™ marketing agency that assists businesses in growing revenue by generating leads, increasing brand awareness, and building customer loyalty through content marketing, sales enablement, web development, marketing automation, and PR.

As HubSpot's 2018 Global Partner of the Year, SmartBug™ is the highest-rated HubSpot partner in the world! We've not only been named twice to the Inc. 5000 list of fastest growing companies, but also won several Great Place to Work® awards. With more than 100 awards for client work in 2018 alone—and a team with a combined 550 marketing certifications—we are fully dedicated to delivering client success and an unparalleled agency experience.

Since 2007, SmartBug Media has been helping businesses increase qualified sales leads, close customers, and enhance brand reach. We're the extension of your marketing team that delivers.



To learn more visit [www.smartbugmedia.com](http://www.smartbugmedia.com)

## Have a question? Curious how we can help grow your business?

Get the conversation started and let's talk about your organization, your goals, and how SmartBug™ can help you achieve them.

Let's Talk

**SmartBug.**

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