



The Golden Rule of Communications for Financial Services Firms

The most important communications rule to follow as a financial services firm? **Narrow your audience.**

It's understandable for you to want your firm to have broad appeal. But if you try to talk to everyone, you talk to no one. So get specific.

Determining your target audience depends on identifying your **buyer personas**. You can begin to develop a buyer persona by first categorizing them as B2B or B2C. Then build a list of basic demographics, like:

- Age
- Gender
- Location
- Role or job title
- Industry

But you need to dig deeper from there. Sketch out what your buyer persona really cares about—and *how those things matter to your business*. Ask:

1. What are my buyer persona's specific goals?
2. What are their challenges and pain points?
3. Where are they in the buyer's journey?
4. What are the barriers to their goals?

Finally, consider how your buyer persona gets information and prefers to communicate. Do they:

1. Use social media channels? Which ones?
2. Belong to your email list?
3. Subscribe to newsletters or blogs?
4. Access information or research in a particular place?
5. Use a laptop, tablet or phone?

Focusing on building one buyer persona at a time provides detail you need to become fluent in their language and have a truly meaningful exchange.