

The Financial Advisor's Guide to Google Analytics



Another carefully prepared whitepaper
from the marketing experts at FMG Suite.



Who is FMG Suite?

At FMG Suite, our business is centered around one simple premise: we love marketing so you don't have to. We know that you are busy meeting with clients and may not have time to roll out the sophisticated marketing strategies you would like. This is why we have created lead generating websites and integrated digital marketing tools for financial advisors. We act as your marketing team and help with automation, email, social media, content creation, website design, and more.

Our team is a group of experts who combine decades of financial marketing experience to pioneer a unique marketing approach for financial advisors. We've recruited top talent in video production, graphic design, animation, compliance, marketing, content creation, web development, search engine optimization, and software design in order to break new ground in digital marketing. Everything we do and create is designed to help you accomplish more through your marketing for less time and money.

Meet your new marketing team by visiting www.fmgsuite.com

WE BELIEVE FINANCIAL PROFESSIONALS DESERVE TO FOCUS ON WHAT THEY LOVE. THEY DON'T LOVE MARKETING.

WE DO.

WE COMBINE REMARKABLE CONTENT AND ELEGANT TECHNOLOGY IN AN INSPIRED MARKETING SUITE.



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Chapter One

What is Google Analytics?

Google Analytics is a tool offered by Google that allows users to track and report their website content. As any marketer knows, an inbound strategy is only as strong as its analytics. Without quantitative data, content is just content. Google Analytics helps users take their website a step further by providing data on what viewers are doing.

Google Analytics is centered on delivering information, but there are many more uses for the software, such as different types of reports. Reports allow users to view more in-depth information about who users are and how they interact with your website or content, such as browser types, operating systems used, or service providers. We will go more into detail about how to make a report and the benefits it can have on tracking your website information.

Google Analytics is a “freemium” service, meaning that the entry level is free, but users can pay to receive more functionality. All of our FMG websites are integrated with Google Analytics automatically and users can view basic data right from their FMG Suite Dashboard.

Some basic questions that financial advisors can answer by using Google Analytics are:

- ① How many people are visiting my website?
- ② What keywords are drawing visitors to my site?
- ③ What pages on my website are viewed the most?
- ④ Where are most visitors coming from (ex: referrals, social media, organic search, paid search, etc.)?



Chapter Two



CHECKLIST

- Make or log into your Gmail account
- Go to Google Analytics website and sign up
- Copy and paste Tracking ID into FMG Metrics section
- Copy and paste Site ID into FMG Metrics section
- Click "Configure"

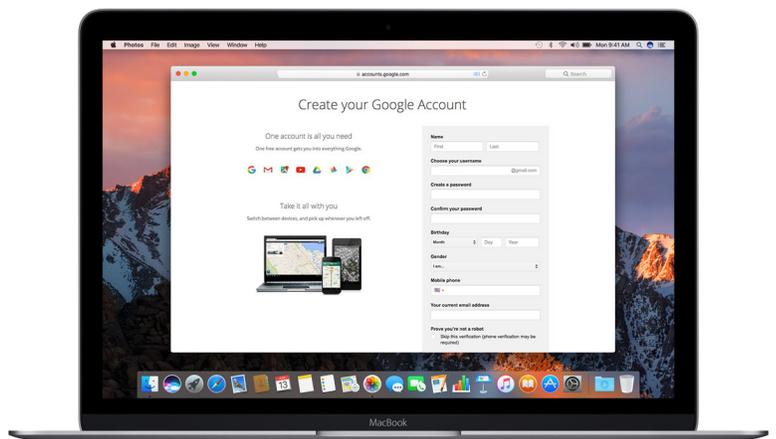
Setting up Google Analytics with FMG Suite Websites

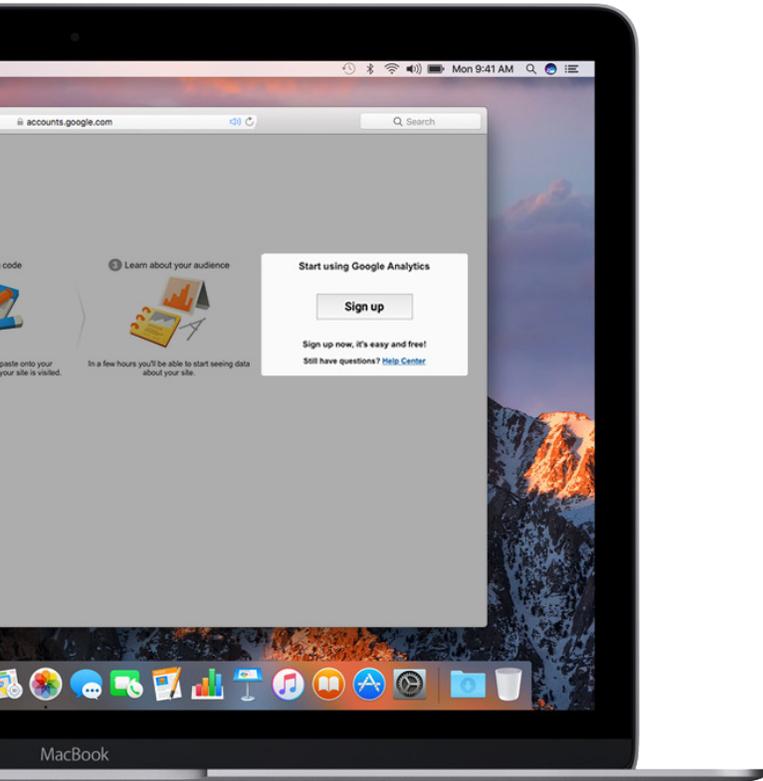
Every marketer should use Google Analytics to accurately track their website data. Not only is it a free service, but it is also easy to set up and FMG Suite websites come integrated with it automatically. Advisors benefit from knowing how many people visit their websites, what pages they view, and even their geographic location.

In order to set up your Google Analytics, you must have a Gmail email address. If you have a Gmail account, great! You're ready for step two. If you don't, here is a quick overview of how to create one:

1

Go to Gmail.com and click Create an Account. You will be greeted with a simple form fill with some basic information, such as your name.

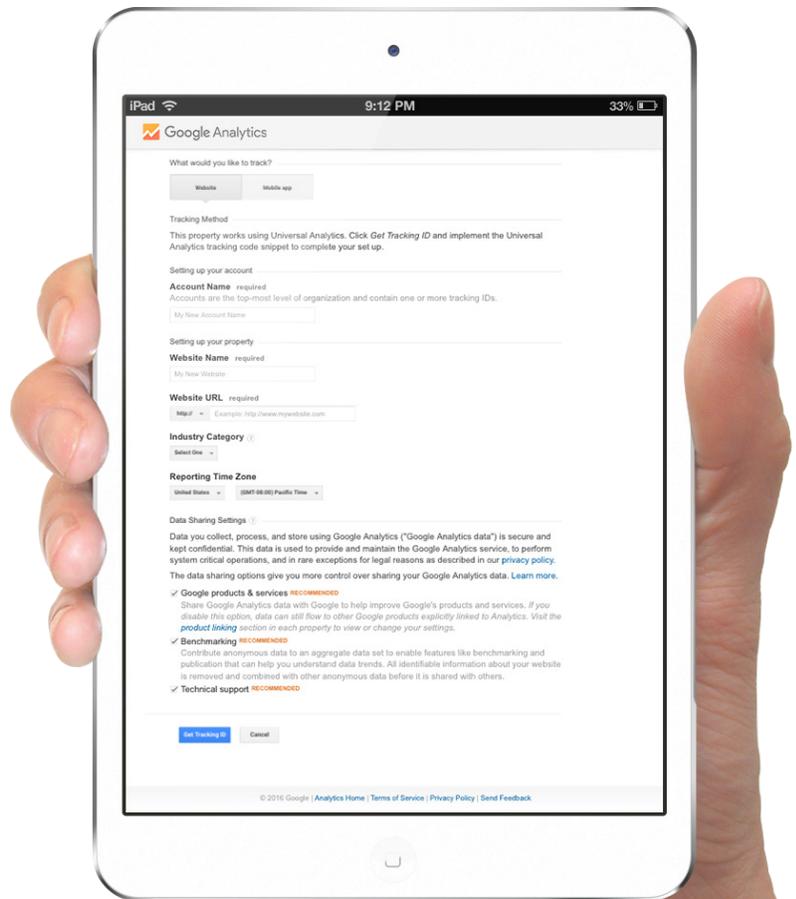




2 Once you create your account, go to analytics.google.com. You will also need another tab with your FMG Dashboard open.

3 Click "Sign Up"

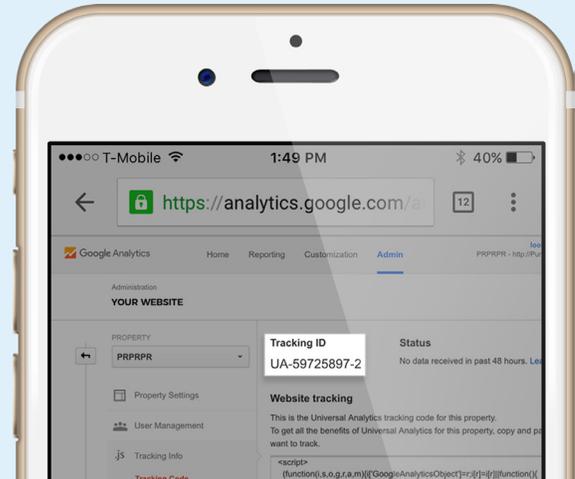
4 Google Analytics will then ask for some basic information about your website, such as your domain and industry. While this explanation is just for website traffic, note that advisors can also track the performance of their mobile app. At the bottom, you will see a button labeled "Get Tracking ID." Click this button.





5

You will receive a Tracking ID, which will start with a UA, such as the one to the right. Copy this whole Tracking ID as it appears.



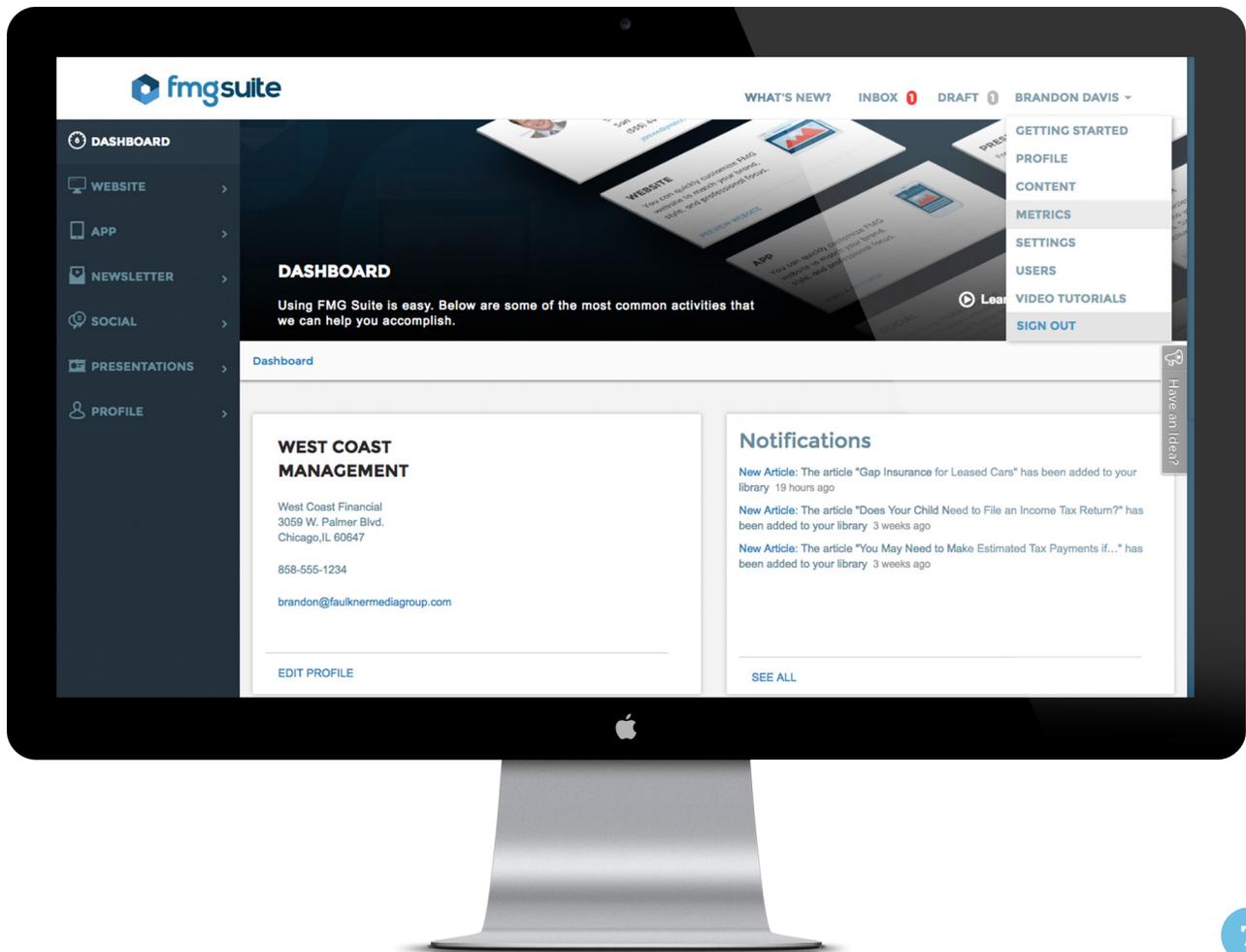
6

Return to your FMG Dashboard, log into your account, and hover over your profile.

Click on Metrics.

7

If you have not already set up your Google Analytics tool, you will see an option to set it up. When you click this, you should see two boxes — one asking for your Tracking ID and one asking for your Site ID.



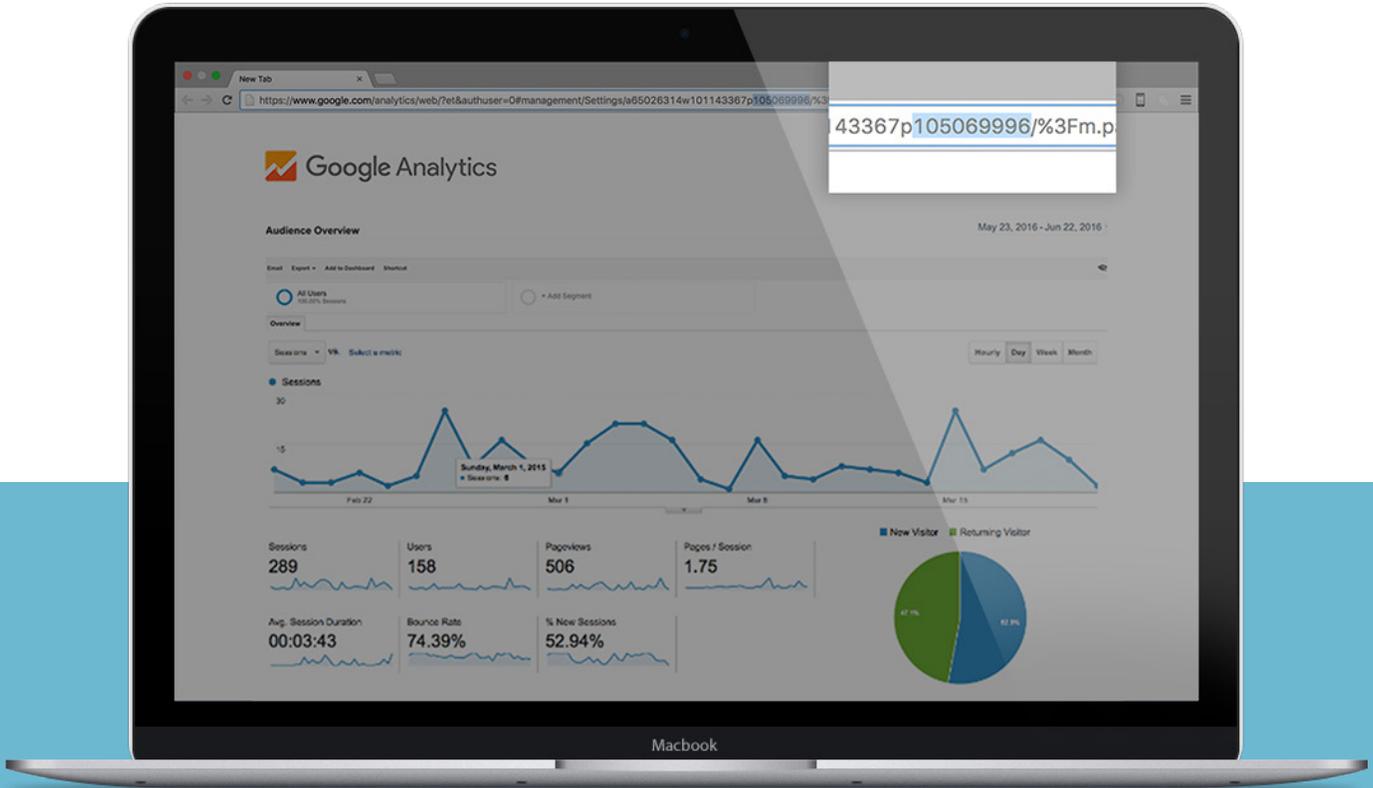


8

Your Tracking ID is the UA number that you just copied. Paste it in the Tracking ID box.

9

To get your Site ID, return to the Google Analytics tab. In the navigation bar, you will see a web address. Select the numbers after the "P" and copy those.



10

This is your Site ID. Return to your Dashboard, paste these numbers into the second box on the Metrics page, and click "Configure."

After completing these steps correctly, your FMG Suite website will be connected to Google Analytics. Within 24 to 48 hours, you will start seeing data roll in.





Chapter Three

A Google Analytics Dictionary

After setting up your Google Analytics account, you may be confused with all the jargon you see on your dashboard. From “visits” to “time on page” to “bounce rate,” there is a lot of vocabulary to nail down to fully understand your data. Here are some of the most common ones:

Visitors

The people who come to your site. Once they are there, they can do a variety of actions (see below).

Pageviews

The number of times visitors viewed a specific page. Pageviews are counted when a visitor views, goes back to, or refreshes a page.

Page/Visit

The number of pages on your site that the average visitor has been to. If the number is too low, it means that visitors may only be viewing your homepage or another popular page. If it is too high, visitors may be not reading pages and just clicking through. Marketers strive for a happy medium.

Social Traffic

The traffic generated to your site from your social profiles, like Facebook, LinkedIn, and Twitter.

Time on Page

The amount of time a visitor spends on a specific page before moving on to the next page or leaving your site. This is one of the most valuable insights because advisors can tell if their pages are being read and, if people leave the site, which page they were last reading.

Time on Site

How long visitors spend on your website overall, which is the sum of the different “Time on Page” measurements.

Bounce

Someone who came to your website, viewed a single page, and left. Usually bounce is seen as a bad thing, unless you are directing traffic to a single landing page or contact form.

New Visitors

The number of visitors who came to your site for the first time, which is determined by whether or not they had a Google cookie from their last visit.



Returning Visitors

The number of visitors who have returned after a previous visit. It is beneficial to compare the ratio of new visitors vs returning visitors because too many new visitors may mean that people are visiting but not coming back, while too many returning visitors may mean that you aren't generating any new, unique leads.

Referring Sites

Other (non-advertising) sites that have sent you traffic, such as outside blogs, referrals, or other social sites.

Direct Traffic

The number of visitors who came straight to your website, either by typing your URL in or clicking a bookmark. They are usually people who have been to your site before, but not always.

Individually, these vocabulary words can be confusing or misleading. Put together, they start to show how potential clients are finding your website, what they're doing when they get there, and which pieces of your content are performing well (along with the ones that could use some work).



Chapter Four

The Key Areas Advisors Should Focus On

Although you are likely a left-brained analytical number lover, you may shy away from Google Analytics due to its jargon-rich, initially overwhelming nature. In an effort to provide users with all the data they'll ever need, the analytics platform can be difficult to sift through or find anything meaningful.

However, advisors may be more inclined to use Google Analytics if they realize that they really only need to know three things about their website when getting started:

How much traffic is coming to my site?



Who is that traffic made up of?



What are those visitors doing?





How much traffic is coming to my site?

First, let's tackle how to see how much traffic you are getting on your site.

1

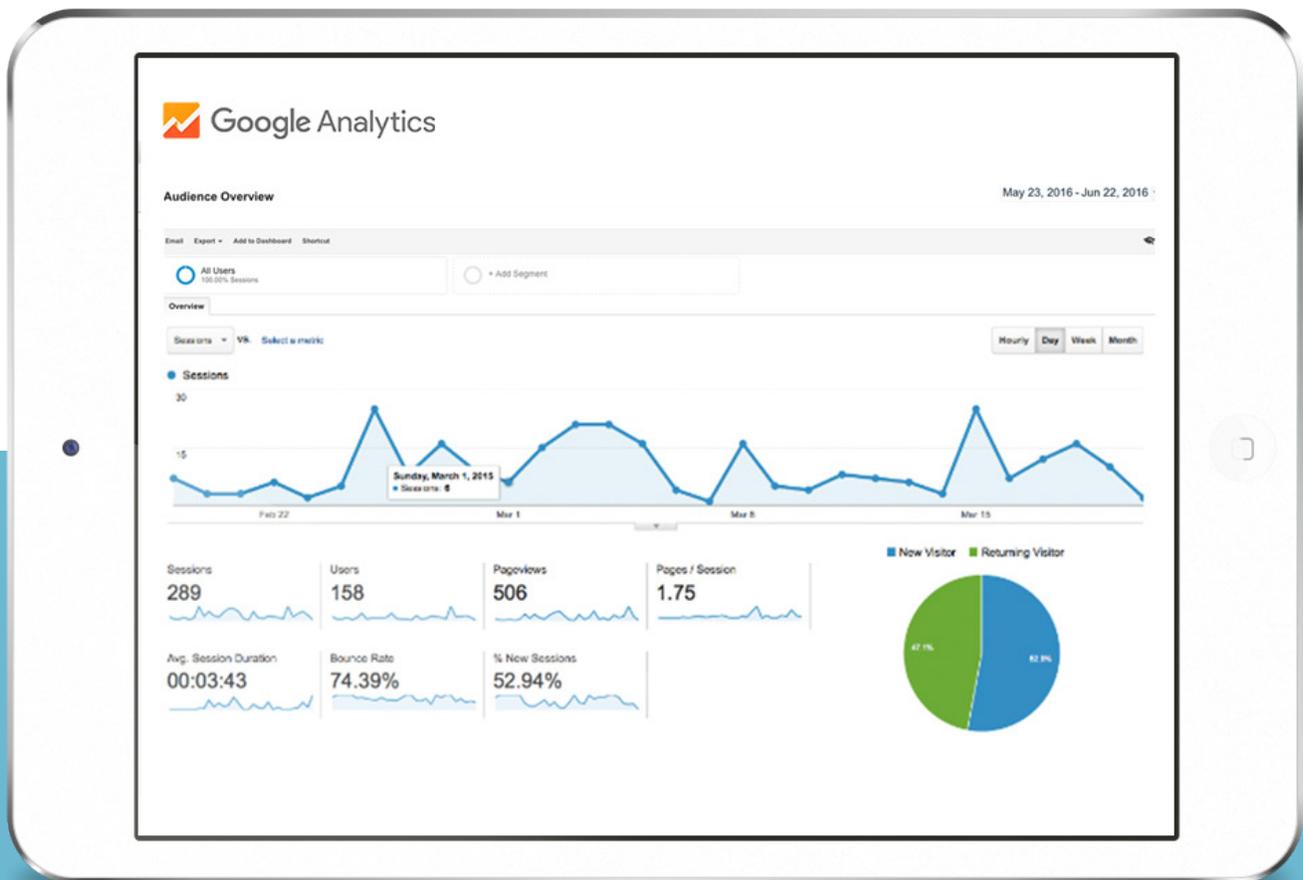
Log into Google Analytics and select your website.

2

In the top right drop down menu, select a date range (such as the last 30 days)

3

Go to Audience, then Overview to view "Users". You should see a screen like this:



As you can see from this example, 158 people visited this website in the last month. You can also see how many page views that entails (506), the average number of pages visitors clicked on when they were there (almost 2), and how long they spent (about a minute and a half). So who are these 158 people?



Who is that traffic made up of?

This is where it can get interesting.

To find out where in the world the site visitors are from, go to "Audience," then "Geo," then "Location." You can see from the data here that a vast majority of these site visitors are from outside the United States. A full 41% are from Russia!

Country	Acquisition			Behavior	
	Sessions	% New Sessions	New Users	Bounce Rate	Pages / Session
	291 <small>% of Total: 100.00% (291)</small>	52.92% <small>Avg for View: 52.92% (0.00%)</small>	154 <small>% of Total: 100.00% (154)</small>	73.88% <small>Avg for View: 73.88% (0.00%)</small>	1.77 <small>Avg for View: 1.77 (0.00%)</small>
1. Russia	120 (41.24%)	0.83%	1 (0.65%)	61.67%	1.65
2. United States	55 (18.90%)	69.09%	38 (24.68%)	52.73%	2.95
3. Brazil	41 (14.09%)	100.00%	41 (26.62%)	100.00%	1.00
4. Italy	8 (2.75%)	100.00%	8 (5.19%)	100.00%	1.00
5. China	7 (2.41%)	100.00%	7 (4.55%)	100.00%	1.00
6. (not set)	6 (2.06%)	100.00%	6 (3.90%)	100.00%	1.00
7. Canada	5 (1.72%)	80.00%	4 (2.60%)	20.00%	8.80
8. France	5 (1.72%)	100.00%	5 (3.25%)	100.00%	1.00
9. Argentina	3 (1.03%)	100.00%	3 (1.95%)	100.00%	1.00
10. Japan	3 (1.03%)	100.00%	3 (1.95%)	100.00%	1.00

This is just an example, but as you can see web visitors come from all over! That's the beauty (and often, curse) of the worldwide web.

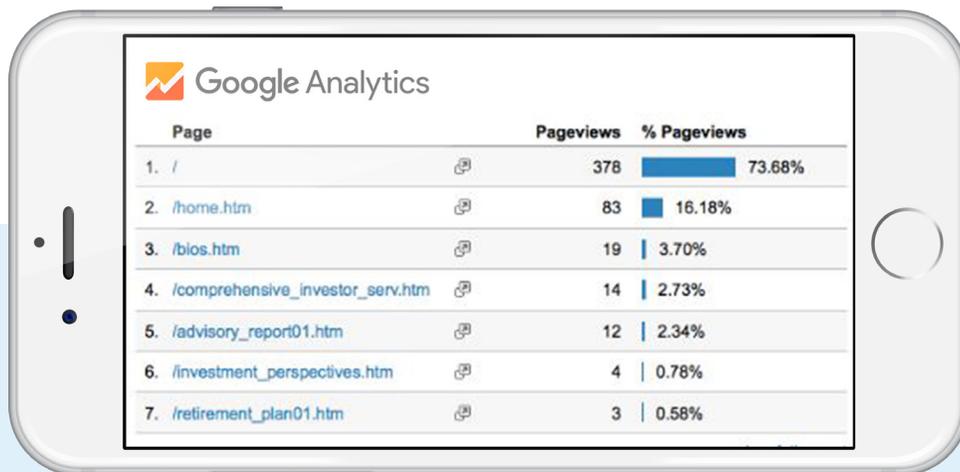


What are those visitors doing?

View what is happening on your site and adjust accordingly.

To find out more about the site visitors' behavior, navigate to "Behavior" and then to "Overview." This section provides a nice summary of which pages are most popular with site visitors.

In this example, 73% of visitors went to a landing page, 16% made it to the home page, and 3% went to the advisor's bios. These aren't great numbers, but they tell a powerful story with simple information.



Some changes and tips this advisor could follow after looking at their analytics:

①

Market to clients and prospects in their local area (they don't do business in Russia).

②

Make sure their home page has a lot of good information, because this is the most popular page, next to their landing page.

③

Use engaging copy to keep visitors on the website longer.

Google Analytics is like a puzzle. Each standalone piece doesn't show the whole picture, but when pieced together, they start to make sense. Play around with the website and see what you can learn about your site.



Chapter Five

Where Google Analytics and SEO Collide

Not only can you measure statistics about your website with Google Analytics, but you can also start to measure your SEO, or Search Engine Optimization, marketing success.

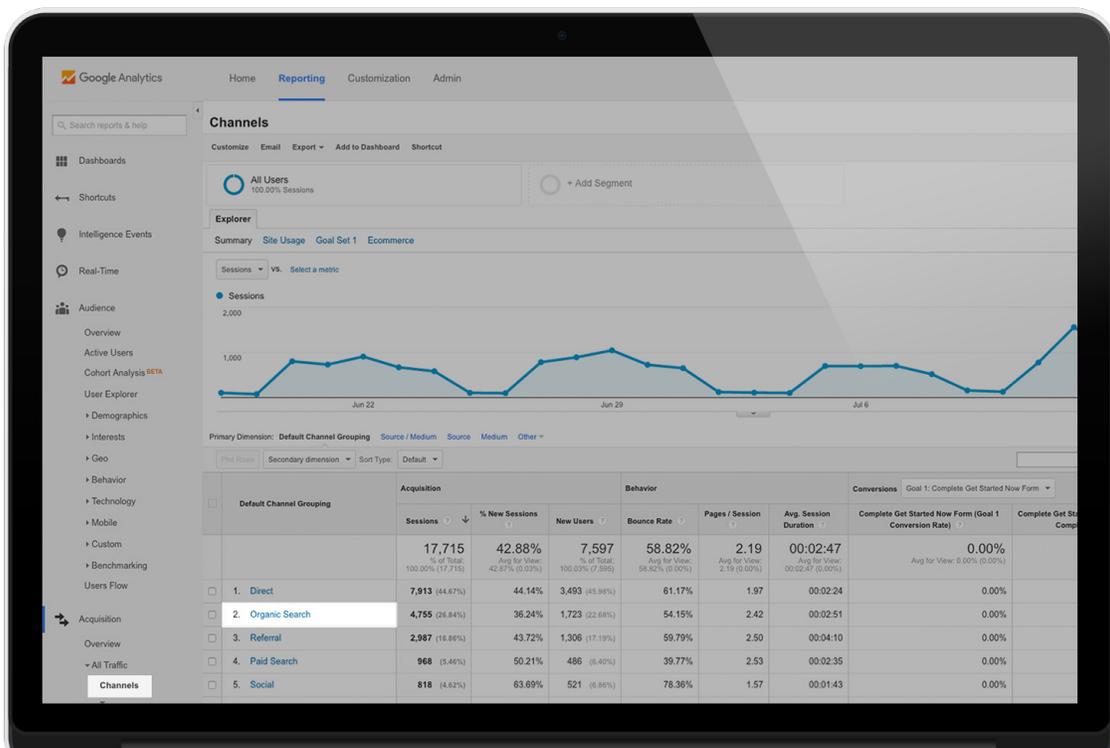
The world of SEO is changing rapidly and there is no sure way to success, but it can be helpful to analyze what your ads are doing, how much organic traffic is coming to your site, and how much your ads cost compared to their performance.

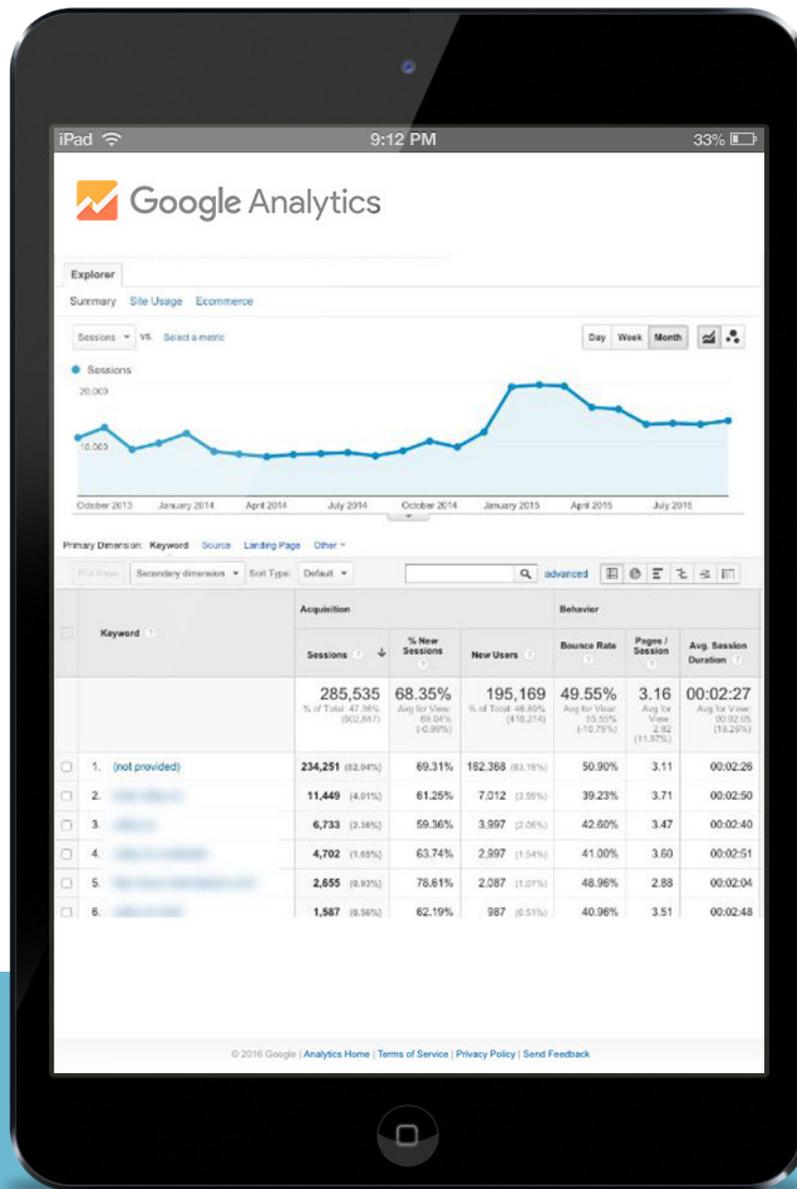
What is SEO Marketing? Organic Traffic

SEO marketing is the combination of paid and unpaid efforts to gain traffic from search engines such as Google and Bing. Whether or not you are paying for search engine ads, a chunk of your traffic will come from web searches.

Organic Traffic is the traffic that comes to your site from search engines without any additional advertising. To view organic traffic to your site:

Open your Channel Grouping report, which can be found by clicking Acquisition > All Traffic > Channels. You will see your traffic segmented into channels, such as Organic Search, Referral, Paid Search, and more.





With this detailed look, advisors can see the first pages viewers go to from search engine results, what keywords drive the most traffic, which search engines drive the most traffic, the pages viewers leave most often, and more.



Choosing Your Keywords

Keywords are words or phrases that frequently appear within your website and that people will search for in a search engine.

In relation to SEO, a good keyword density is between 2 and 4%, meaning your select keywords make up 2 to 4% of your total content.

While there are no guarantees in the world of SEO, the goal of incorporating select keywords into your website and content is to help you appear higher in search engine results when someone searches for an advisor in your geographical region or area of specialty.

There's no one right answer, but generally you want at least three and no more than 10 keywords. More keywords doesn't necessarily mean more search results. You need a good balance of quality and quantity. Within your website content, you should aim for your keywords to appear 2 to 4% of the time. If you choose 10 keywords, it will be hard to organically incorporate that many different words and phrases multiple times within your pages.

Choosing your keywords is where the analytical side of your brain takes the lead. There are thousands of articles on strategies for creating keywords and it can be overwhelming if you dive too deep into the rabbit hole of SEO. We're going to make it as easy as possible for you to choose your keywords in less than 30 minutes.

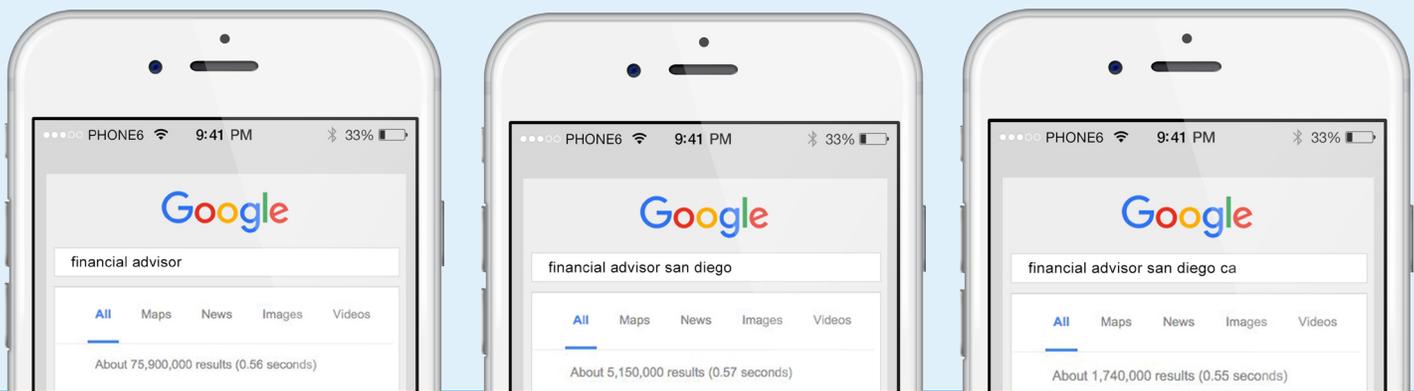


①

Jot down a list of five to 20 words or phrases that come to mind when you think about your practice and what you do. These keywords could be as vague as “financial advisor” and as specific as “IRA rollovers for executives in Walla Walla Washington.”

②

Now it’s time to narrow down your list. For vague terms, such as “financial advisor,” “investment advice,” and “retirement planning,” work on specifying them. There are tens of millions of results for these terms. You want to compete in a smaller pool. Look at what happens when we search for “financial advisor” versus “financial advisor san diego” versus “financial advisor san diego ca”:



We learned two things from this search. First, look at how the number of results drops when we add our city. The more specific you can get, the better. Second, we get different results when we add our state. Your keywords can be iterations of one another. So, if you’re in San Diego, you may include several variations of San Diego, such as “San Diego CA,” “San Diego California,” etc.

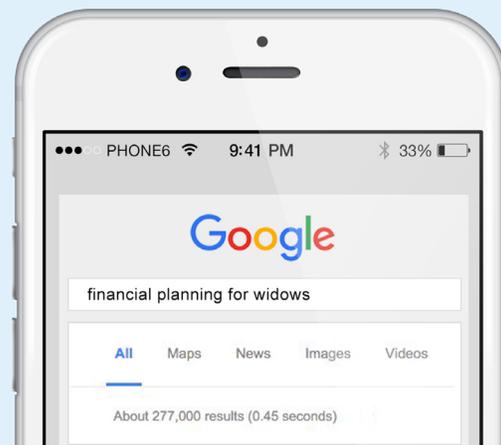
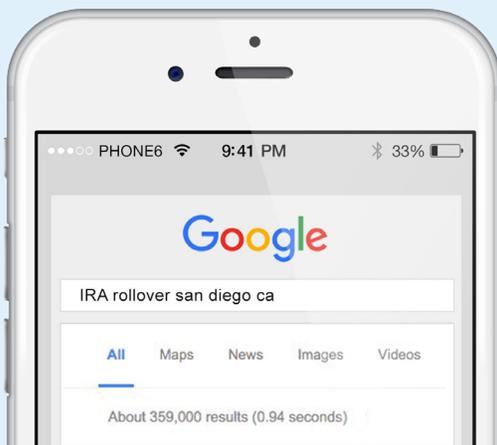
③

Now that you’ve created a few keywords that include variations of your location, focus on your specialities. What special services do you provide, or what types of clients do you enjoy serving? Try running some Google searches to see the results you get. Some keywords you could try include “financial advisor for affluent families,” “private wealth services,” “financial advice for divorced women,” “IRA rollovers in Dallas,” “Social Security planning for couples in Florida,” etc.

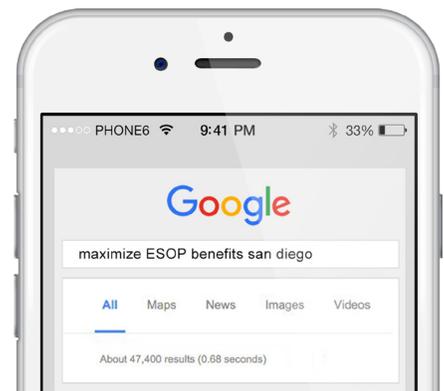
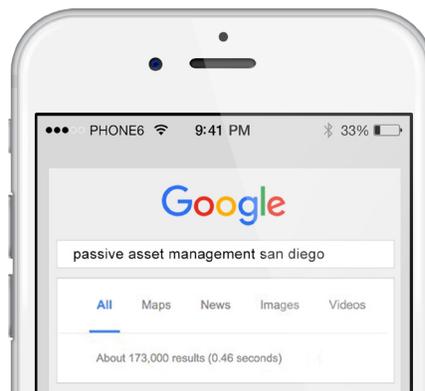
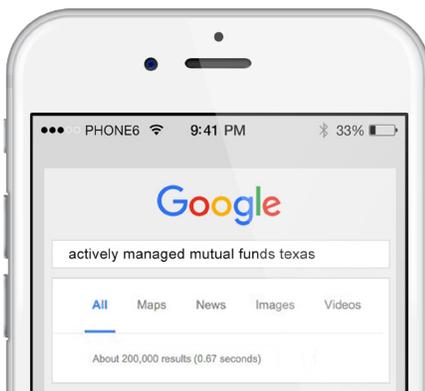
The more specific you get, the more likely it will be that your site appears higher in the search results. Aim to create keywords with at least three words. Ideally, your search terms yield under 1 million pages of content in a Google search. Anything more than 1 million represents a very saturated niche. If you can create keywords with under 100,000 results, you’re a true SEO rockstar.



Let's look at how our results fall far below the 1 million mark when we get more specific:



Now, let's try getting really specific:



But what are the chances that your target client base will search for these terms? While it largely depends on the financial fluency of your client base, you should generally avoid using too technical jargon that the average investor wouldn't search for.



4

By now, you should have a tailored list of 3 to 10 keywords. Incorporate these keywords into your website content, as well as in the title tags and descriptions of pages. If you have a FMG Suite website, each system and custom content page in your dashboard has an SEO Toolkit where you can create a title and description tag.

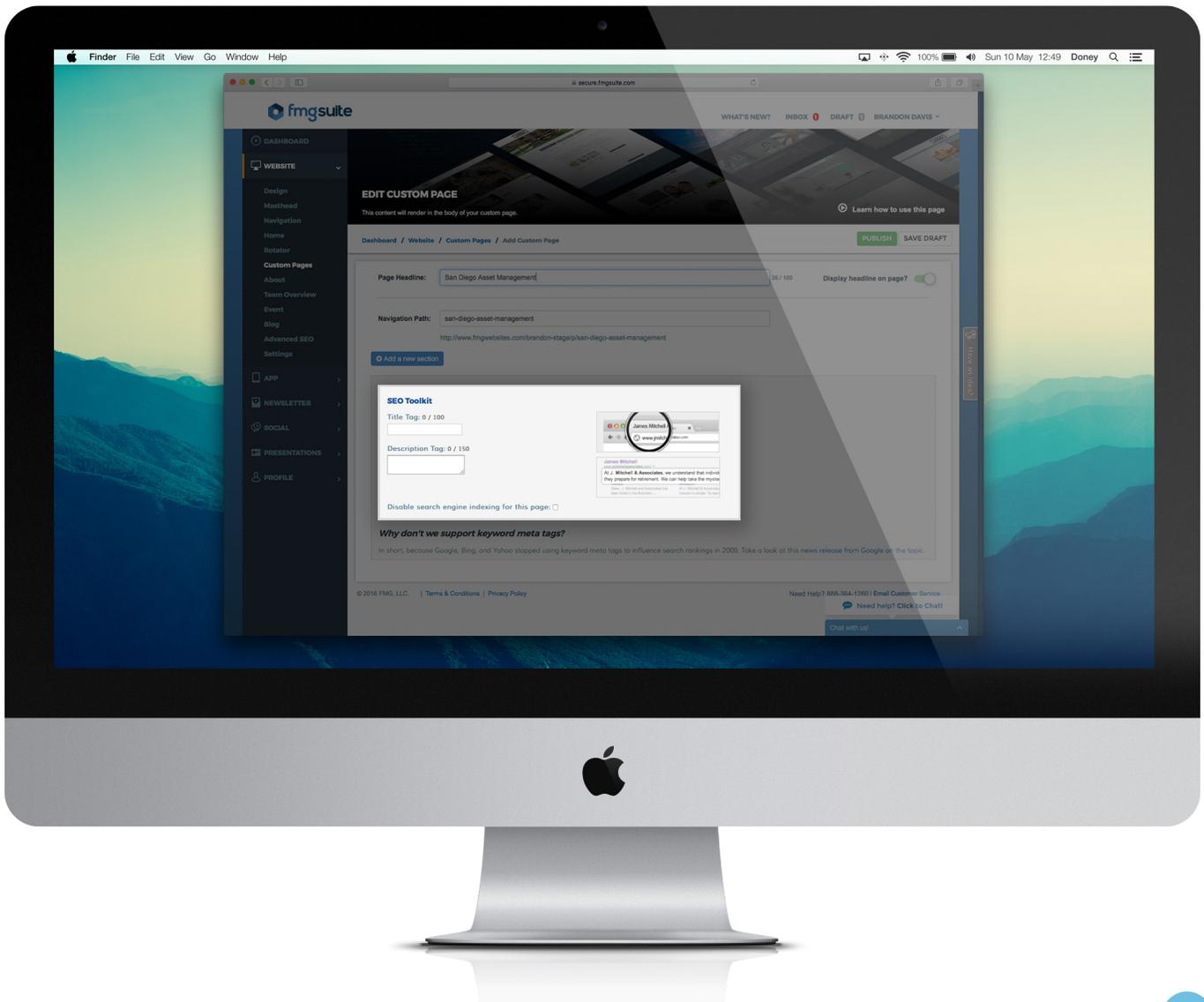
Keep within the character count suggested, as Google will cut off any letters that go beyond the maximum limit. If you're adding your tags to your home page and you specialize in retirement planning in southern California, you may write the following:

Title Tag

ABC Financial Group | Southern California Retirement Planning

Description Tag

ABC Financial Group provides retirement planning, estate planning, and 401k rollovers to clients in San Diego, Orange County, and Los Angeles.

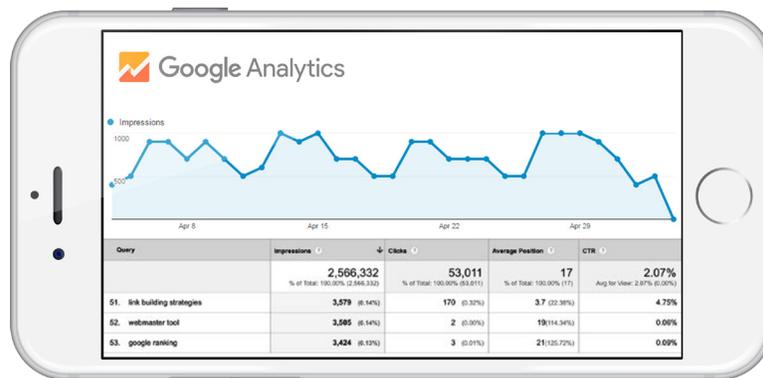




Finding Your Hard Working Keywords

One of the main ideas with SEO marketing is establishing keywords. You know how to choose keywords to integrate into your content. Now, we'll show you how to find your most salient keywords.

Navigate to Acquisition > Search Console > Queries (Queries is just a fancy way to say searches). You should see a page like this:



Impressions

Amount of times one of your site's pages, ranked for that keyword, has been shown in the search results.

Clicks

Amount of times one of your site's pages has been clicked after showing in a search for that keyword.

CTR

The percentage of the time that one of your pages, when shown for that keyword, is clicked.

Average Position

Where a page is shown for that keyword.

As you can tell, this function is very useful in SEO marketing because you can see which keywords perform best, which are being searched for most, and which drive traffic to your website.

So Now What?

Numbers are just numbers until a marketer does something with them. A good next step may be to sprinkle more of your most popular keywords into your website content. Google and other search engines scour your page and find keywords, and they put emphasis on titles, page headers, and subheaders. These are great places to sneak in your keywords (for more on headers and subheaders, [check out our blog post](#)).



Chapter Six

Where to Go From Here

Hopefully now, you feel a little more versed in the world of Google Analytics and see it more as a helpful tool than an overwhelming piece of software filled with Internet jargon and complex options. All FMG Suite websites come integrated with Google Analytics and with a little more knowledge, advisors can track everything mentioned in this whitepaper without hiring a SEO guru.

First, we looked at what Google Analytics is and how it can help. We covered some of the basic questions an advisor can answer by using Google Analytics.

Second, we looked at how to set up your Google Analytics account and link it to your website. This is the first step to gathering useful, concrete data.

Next we examined some of the most common terms that you may hear when researching Google Analytics. We covered things like traffic, page views, visitors and more.

Once we understood some of the key terms, we looked at the types of data you can gather and how it can help your marketing. We explained some of the key areas that advisors should be looking at, how Google Analytics influences Search Engine Optimization, and how to incorporate keywords into your marketing efforts.

This is just the foundation of Google Analytics and once you understand these basic steps, you will be well on your way to improving your marketing strategy. Some steps you can take to practice what you learned in this whitepaper may include:



Reviewing the key areas discussed in Chapter 4.



Reviewing your analytics every few months.



Updating your site's SEO keywords (focus on page titles, headers, and subheaders).



Reviewing and studying the terms we covered (and more).

Data aggregation is the future of marketing and helps make your content strategies more measurable. Once you master these skills, play around with Google Analytics and see what else you can dig up!

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