

Brigid O'Connor

## Taking an Image Inventory

*Brigid O'Connor says there is a lot that advisors can do to get their message through today's clogged communications channels. BY ELLEN UZELAC*

There is nothing syrupy about communications strategist Brigid O'Connor, whose tell-it-like-it-is marketing makeovers are emerging as hot tickets on the industry's conference circuit.

In just a year and a half, O'Connor's popularity quotient has surged among financial advisors, who find her crisp presentations both insightful and accessible. In a recent newsletter, industry watchdog Bob Veres went so far as to call her work transformative.

The first tip-off that O'Connor, 35, likes to shake things up is the Harry S. Truman quote that accompanies her own marketing materials: "I never give them hell; I just tell the truth, and then they think it's hell."

"I tell it like it is mostly because it's the only way I know how to move people and firms toward improvement," says O'Connor, a former public relations director for the Financial Planning Association and its predecessor, the Institute of Certified Financial Planners. "I believe in brutal honesty, just short of creating carnage."

In her work, O'Connor has a single overarching goal: helping people communicate with efficiency and purpose. "People spend more time programming their TiVo than perfecting how to



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get their point across,” says the Denver-based O’Connor. “They don’t take the time to think about it, and sometimes they are simply too close to it.”

In her high-energy presentations, O’Connor helps advisors identify what she calls their “savvy” factor, that elusive element that truly successful people communicate. She also asks them to take an inventory of their business image.

“It’s worth analyzing how your business communicates. Financial advisors can spend serious dollars to create four-color brochures and sometimes these creations aren’t attractive to the right audience or don’t say anything,” says O’Connor, who has an MBA from the University of Colorado. Virtually every firm today has a website, brochures and business cards, which O’Connor says can amount to a negative.

“They may say nothing at all or nothing compelling,” says O’Connor. “If you look over the array of those things, the messages in any one of them are often conflicting and inconsistent. On top of that, if you actually speak to the advisors themselves, they offer another set of messages that doesn’t appear in any of the materials. That’s haphazard communicating and that’s not going to make it through today’s glutted communications channels.”

One of O’Connor’s top tips? Think about not just what you want to communicate — but to whom. “No matter whether you’re speaking or writing or however you choose to communicate, you have to think about the end audience,” she says. “Really think about what’s in it for them. If you can’t

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answer that question because you are too close to it, find someone who can. If your materials don’t do it, you are not going to be effective.”

When it comes to the kind of “service marketing” that financial advisors must do, consumers are looking for clues, O’Connor says. “It’s not like a hair dryer. With service marketing, you can’t take it home and see if it has the right oomph,” she adds. “So you need to really sit down and dedicate some thought to image and messaging. Make sure that you and your goals and the myriad of ways you communicate are working for you, not against you.”

Many advisors err by producing materials that assume the consumer wants financial advice and wants it from them personally. “I think that’s the No. 1 assumption a financial advisor makes. The materials often talk almost exclusively about the advisor’s credentials, whereas I think [consumers] need some convincing that financial advice is a gain, that the process will be safe and rewarding,” says O’Connor. “Before you assume you are near the close of a sale, be sure you are selling something compelling.”

O’Connor took her firm, At Ease,

full-time a year and a half ago after operating it as a side venture while she worked various communications and media jobs, starting off as an assistant producer for the TV magazine show, “Good Afternoon, Colorado.”

She worked for a department store chain and state bar association before joining the Institute of Certified Financial Planners, where she regularly shepherded board members on national media tours, including guest spots on CNN and CNBC and interviews with *The Wall Street Journal* and *Money* magazine.

After leading the communications efforts of the ICFP merger with the Financial Planning Association, O’Connor worked to build brand. One of the most visible of her successes was the FPA’s logo being featured on every box of Quicken software sold in the U.S. She left the FPA in 2000 to take an executive position with a healthcare association in Denver.

Along the way, O’Connor has given presentations aimed at helping audiences become media-savvy. Today, she primarily spends her time speaking and training, but also works with clients on image inventories, issues management, message development and executive coaching.

“My addiction is public speaking,” says O’Connor, who discovered her “bliss,” as she puts it, after joining the debate team in junior high. “I’m really addicted to the high of seeing people go ‘Aha’ and from fielding questions that indicate they are excited enough to go back to their office and make simple changes that will possibly impact their ability to be heard.” **IR**