



MARKETING

Implementation

FROM IDEAS TO ACTION



LIMITLESS
ADVISER
BY EDUCE

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STEPHANIE
BOGAN



TIFFANY
CHARLES

What's HOLDING YOU BACK?

FROM

I don't know how to try something new

I can't do that

Asking for help is hard

I don't have the time or talent

It won't work

TO

If it's been done before, it can be done again

I have all the tools I need

And also happens to get things done better

It's about who, not how

If you don't buy a ticket, you can't win the lottery

RESULTS...


I'm clear on what I do, the value I deliver and how I can best help

I have a clear plan that is scheduled

I have clear goals, tracking and accountability in place

I am making progress and seeing results





MAKE SURE YOUR
Eyes AREN'T BIGGER
THAN YOUR *Stomach*



CLARITY

- Marketing Action Playbook
- 1 Page Annual Launch Plan
- Success Shifter



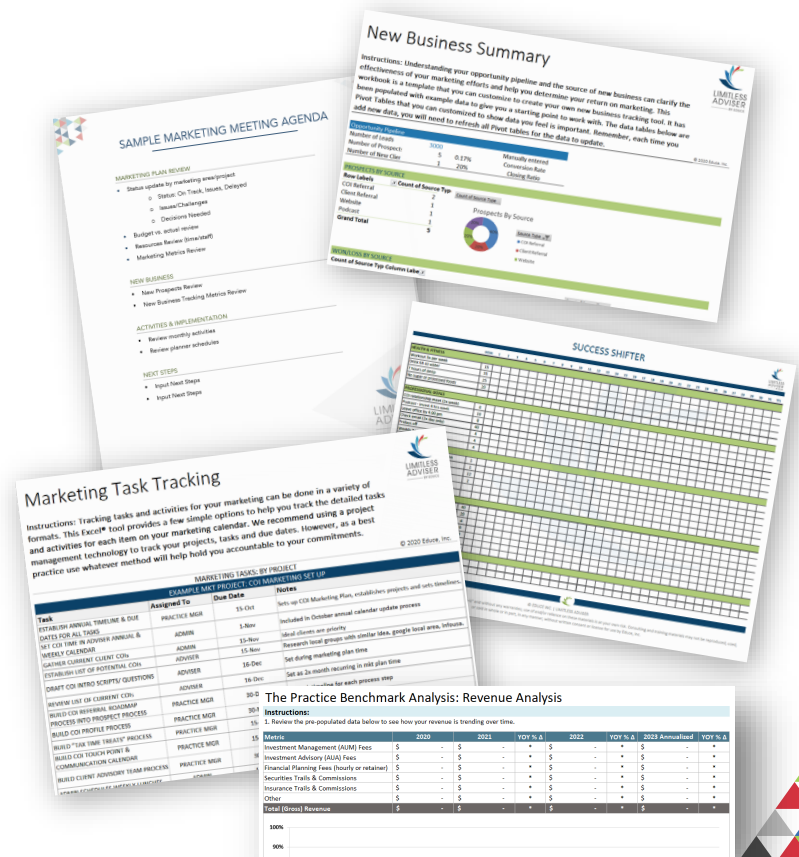
TRANSPARENCY

- 1 Page Marketing Plan
- Success Shifter
- Practice Benchmark Tool



ACCOUNTABILITY

- Sample Marketing Mtg Agenda
- New Business Tracker Tool
- Marketing Task Tracking Tool
- Practice Benchmark Tool
- Success Shifter



Marketing Momentum
REQUIRES CONSISTENCY...



AND PATIENCE

It can take 12-36 months to see a return on your marketing investment.





#1 TURN BIG STRATEGIES
INTO SMALL TASKS



#2 TAG YOUR TEAM



#3 CREATE YOUR REAL BUDGET



#4 LEVERAGE TECHNOLOGY



#5 CREATE ACCOUNTABILITY



#6 KNOW YOUR PIPELINE



#7 TRACK AND MONITOR SUCCESS



MARKETING MOMENTUM

Process



TAKE OUT YOUR
Marketing Accountability Form



#1 TURN BIG STRATEGIES INTO SMALL TASKS

TRANSLATE
BROAD
STRATEGIES

NOTES &
SCRIBBLES

DISCUSSIONS
& FEEDBACK

MARKETING
MINDMAP

MARKETING
PLAYBOOK



INTO
SPECIFIC
TASKS

1-PAGE MARKETING
PLAN

PROJECTS &
PROCESSES

MARKETING TASK
TRACKING

METRICS &
MEASURES





#2 TAG YOUR TEAM

Ask

- 🕒 What skillsets / abilities do I have and what do I need?
- 🕒 Who is going to manage my marketing plan?

Do

- 🕒 Learn it and do
- 🕒 Or delegate to others:
 - 🕒 Virtual Marketing Team
 - 🕒 Virtual Assistant
 - 🕒 Hire / Train Internally

Tip:

IF YOU DON'T ENJOY IT, GET OTHERS TO DO IT FOR YOU OR DON'T DO IT.





#3 CREATE YOUR REAL BUDGET

YOUR "VISION IN ACTION" IN BOTH TIME AND COST

PLAN TIME IN YOUR
ANNUAL CALENDAR

"BUILD" VS. "PROSPECT"

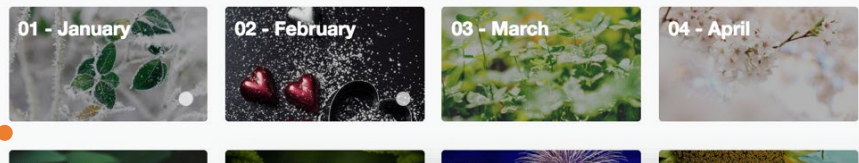
CASH FLOW &
CAPITAL
INVESTMENT





#4 LEVERAGE TECHNOLOGY

Use project management tools



COI - In Person Meeting (2 Per Mo)
0/2

Make calls for meetings w/ Existing BO & BO COIs 3 per week
0/12

Existing Client Ask - BO LinkedIn Lists
0/12

GrapeVine 6 Articles - 3x per week
0/12

+ Add another card

Meet w New COIs 1 per month
0/1

Meet w BO COIs 2 per week
0/8

OPPORTUNITY
CityTower Inc. - Document management system

ACCOUNT NAME: CityTower Inc. CLOSE DATE: 11/13/2017 AMOUNT: \$450,000.00 OPPORTUNITY OWNER: Catherine Owens

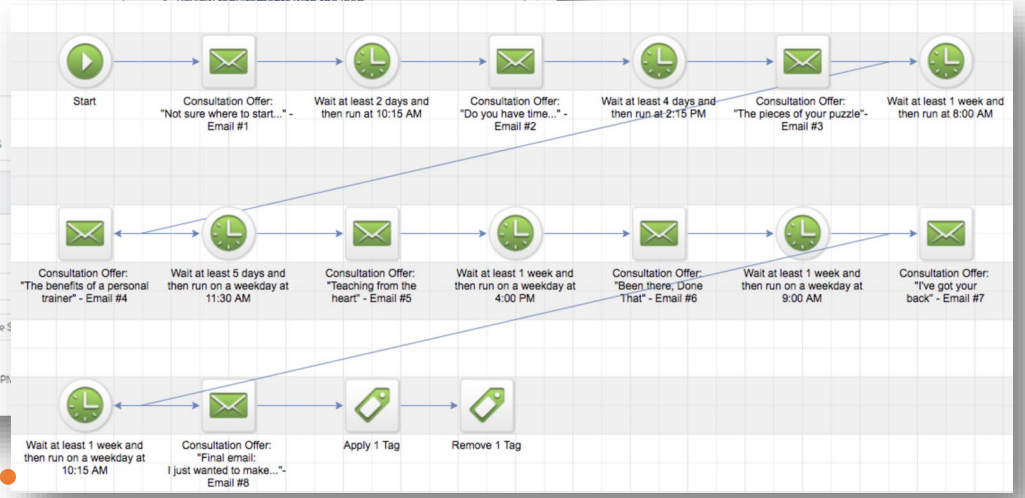
Needs Analysis | Proposal | Negotiation | Closed

KEY FIELDS: Amount \$450,000.00, Close Date 11/13/2017

GUIDANCE FOR SUCCESS: Understand the business need and decision criteria.

ACTIVITY: New Task, New Event, Email

Next Steps: Internal opportunity team preparation meeting



Marketing Task Tracking

Instructions: Tracking tasks and activities for your marketing can be done in a variety of formats. This Excel™ tool provides a few simple options to help you track the detailed tasks and activities for each item on your marketing calendar. We recommend using a project management technology to track your projects, tasks and due dates. However, as a best practice use whatever method will help hold you accountable to your commitments.

Task	Assigned To	Due Date	Notes
ESTABLISH ANNUAL TIMELINE & DUE DATES FOR ALL TASKS	PRACTICE MGR	15-Oct	Sets up COI Marketing Plan, establishes projects and sets timelines.
SET COI TIME IN ADVISER ANNUAL & INTERIM CALENDAR	ADMIN	1-Nov	Included in October annual calendar update process
GATHER CURRENT CLIENT COI	ADMIN	15-Nov	Ident clients are priority
ESTABLISH LIST OF POTENTIAL COI	ADVISER	15-Nov	Research best groups with similar idea, google local area, Infusion.
DRAFT COI INTRO SCRIPTS/ QUESTIONS	ADVISER	16-Dec	Set during marketing plan time
REVIEW LIST OF CURRENT COI	ADVISER	16-Dec	Set as 2x month recurring in mkt plan time
BUILD COI REFERRAL ROADMAP	PRACTICE MGR	30-Dec	Set task timeline for each process step
PROCESS INTO PROSPECT PROCESS	PRACTICE MGR	30-Dec	Set task timeline for each process step
BUILD COI PROFILE PROCESS	PRACTICE MGR	30-Dec	Set task timeline for each process step
BUILD "TAX TIME TREATS" PROCESS	PRACTICE MGR	30-Dec	Set task timeline for each process step
BUILD COI TOUCH POINT & COMMUNICATION CALENDAR	PRACTICE MGR	15-Jan	Set task timeline for each process step
BUILD CLIENT ADVISORY TEAM PROCESS	PRACTICE MGR	15-Nov	Set task timeline for each process step
FORM FUNDRAISER CHECK & LAUNCH	ADMIN	30-Nov	Set task timeline for each process step

Set tasks with due dates

Track leads and prospects in your CRM

Marketing automation

New Business Summary

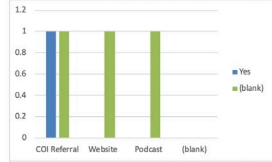


Number of Prospects Closing Ratio

4 25%

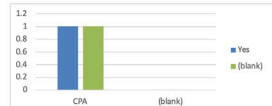
Potential Clients By Source

Count of Source Type	Column Labels	(blank)	Grand Total
Row Labels	Yes	(blank)	
CDI Referral	1	1	2
Website		1	1
Podcast	1	1	1
(blank)			
Grand Total	1	3	4



Potential Clients By Source

Count of Referral Sour	Column Labels	(blank)	Grand Total
Row Labels	Yes	(blank)	
CPA	1	1	2
(blank)			
Grand Total	1	1	2



#5 CREATE ACCOUNTABILITY

THE PLAN WILL ONLY FAIL IF YOU FAIL TO WORK THE PLAN.

PLANS FAIL BECAUSE...

It isn't clear who is responsible

People aren't held accountable (including you)

Success Shifter

GOAL	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	TTL		
SET UP FOR SUCCESS																																		
Read 1 hour per day	24																																	
Improve the firm day	2																																	
Stick to weekly calendar	20																																	
Distractions/off schedule	0																																	
PERSONAL																																		
Hour of Exercise (3x / wk)	12																																	
Downtime for myself each wk	4																																	
Play tennis	2																																	
Date night with spouse	1																																	
BUSINESS IMPROVEMENT & CLIENT SERVICE																																		
Check email 2x day	4																																	
Weekly Business/Goals Review	10																																	
CDI Connect Calls	3																																	
Client Connect Calls	10																																	
Limitless Time (2 hrs/wk)	8																																	
BUSINESS DEVELOPMENT																																		
Marketing Mondays	4																																	
Social Media Posts	10																																	
Blog posts	3																																	
Participate in monthly networking event	4																																	
Personal networking opportunities	6																																	

For Individuals

SAMPLE MARKETING MEETING AGENDA

MARKETING PLAN REVIEW

- Status update by marketing area/project
 - Status: On Track, Issues, Delayed
 - Issues/Challenges
 - Decisions Needed
- Budget vs. actual review
- Resources Review (time/staff)
- Marketing Metrics Review

NEW BUSINESS

- New Prospects Review
- New Business Tracking Metrics Review

ACTIVITIES & IMPLEMENTATION

- Review monthly activities
- Review planner schedules

NEXT STEPS

- Input Next Steps
- Input Next Steps



For Ensembles





#6 KNOW YOUR PIPELINE

BUSINESS STRATEGY (Vision, Goals, Product, Pricing)

MARKETING STRATEGY
(Goals, Position, Packaging)

AWARENESS

EDUCATION

ENGAGEMENT

ACQUISITION

ONBOARDING

CLIENT SERVICE MODEL

MARKETING (MAP)

SALES

SERVICE

LEADS

PROSPECTS

NEW CLIENTS

- Lead: warm or cold
- Prospect: by stage/source
- New Client



New Business Source Tracking

Instructions: Understanding the source of new clients helps to clarify the effectiveness of different areas of marketing and potentially the return on marketing for each area. This Excel® template is a starting point for you to develop new business source tracking for your firm. It is a best practice standard to leverage your CRM.

Sourced By Adviser	Name	Source Type	Referral Source	Referred Name	Stage: Lead, Prospect, New Client	Date Received	In Person Intro or Qualifying Call	Date
Jones	J & S Smith	COI Referral	CPA	J Hansen	New Client	12/28/18	Qualifying Call	1/2/19
Jones	M Kelly	Website			Lead	1/2/19	Pending	
Jones	R Villa	Podcast			Prospect	1/7/19	In Person	1/27/20
Jones	P Nutt	COI Referral	CPA	K Muffet	Lead	1/12/19	Pending	



#7 TRACK AND MONITOR SUCCESS



SOLO
ADVISERS
Annual calendar



ENSEMBLE
TEAMS

TRACK MONTHLY:

1-PAGE MARKETING PLAN

Monthly plan/tracking: Success Shifter
Marketing budget
New Business Tracker
KPIs: selected KPIs

MARKETING PLAN

Marketing meeting agenda
Marketing budget
New Business Tracker
Know your data
Firm-level KPIs
Adviser-level KPIs



YOUR *Turn...*



#1
TURN BIG
STRATEGIES INTO
SMALL TASKS



#2
TAG YOUR TEAM



#3
PUT TIME IN
YOUR SCHEDULE



#4
LEVERAGE
TECHNOLOGY



#5
CREATE
ACCOUNTABILITY



#6
KNOW YOUR
PIPELINE



#7
TRACK AND
MONITOR
SUCCESS

IN PRACTICE

1. Use your Marketing Action Playbook to decide where you most need to focus.
2. Turn your 1-Page Marketing Plan into action items using the Marketing Task Tracking Tool or your CRM
3. Block out your Q4 schedule using the Template Annual Calendar and Weekly Schedule Sample
4. Track and monitor your marketing results with the Success Shifter and New Business Tracker Tool

RESOURCES

- 1-Page Marketing Plan
- Build Your Virtual Marketing Team Breakout
- Content Calendar Template
- Content Calendar Guide
- Marketing Action Playbook
- Marketing Accountability Form
- Marketing Task Tracking Tool
- New Business Tracking Tool & Video
- Performance Benchmarking Tool & Video
- Sample Marketing Mtg Agenda
- Success Shifter
- Weekly Schedule Sample

RECOMMENDED READING

- All Marketers Are Liars: The Underground Classic That Explains How Marketing Really Works, Seth Godin
- The 1-Page Marketing Plan: Get New Customers, Make More Money, And Stand Out From The Crowd, Allan Dib
- Permission Marketing: Turning Strangers into Friends And Friends Into Customers, Seth Godin
- The Power of Practice Management: Best Practices for Building a Better Advisory Business, Stephanie Bogan
- Why It's Easier to Market to a Financial Adviser Niche, Michael Kitces
- Measure What Matters: Rock The World With OKRs , John Doerr

Q&A

