

# WELCOME

## OCTOBER COACHING CALL



### Coaching Calls:

Nov. 14 at 10 a.m. PT: Office Hours

Nov. 28 @ 10 a.m. PT: Relationship to Money



### Limitless Book Club

Oct. 26 @ 2 p.m. PT:

"Tribes: We Need You To Lead Us"

By Seth Godin



### DOWNLOAD YOUR

Marketing Accountability Form  
in the chat



FOR TODAY'S QUESTIONS  
[slido.com](https://www.slido.com), #GoodVibes  
on your phone or second screen



# MARKETING IMPLEMENTATION

FROM IDEAS TO ACTION



STEPHANIE  
BOGAN



ADAM  
CMEJLA

# 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...

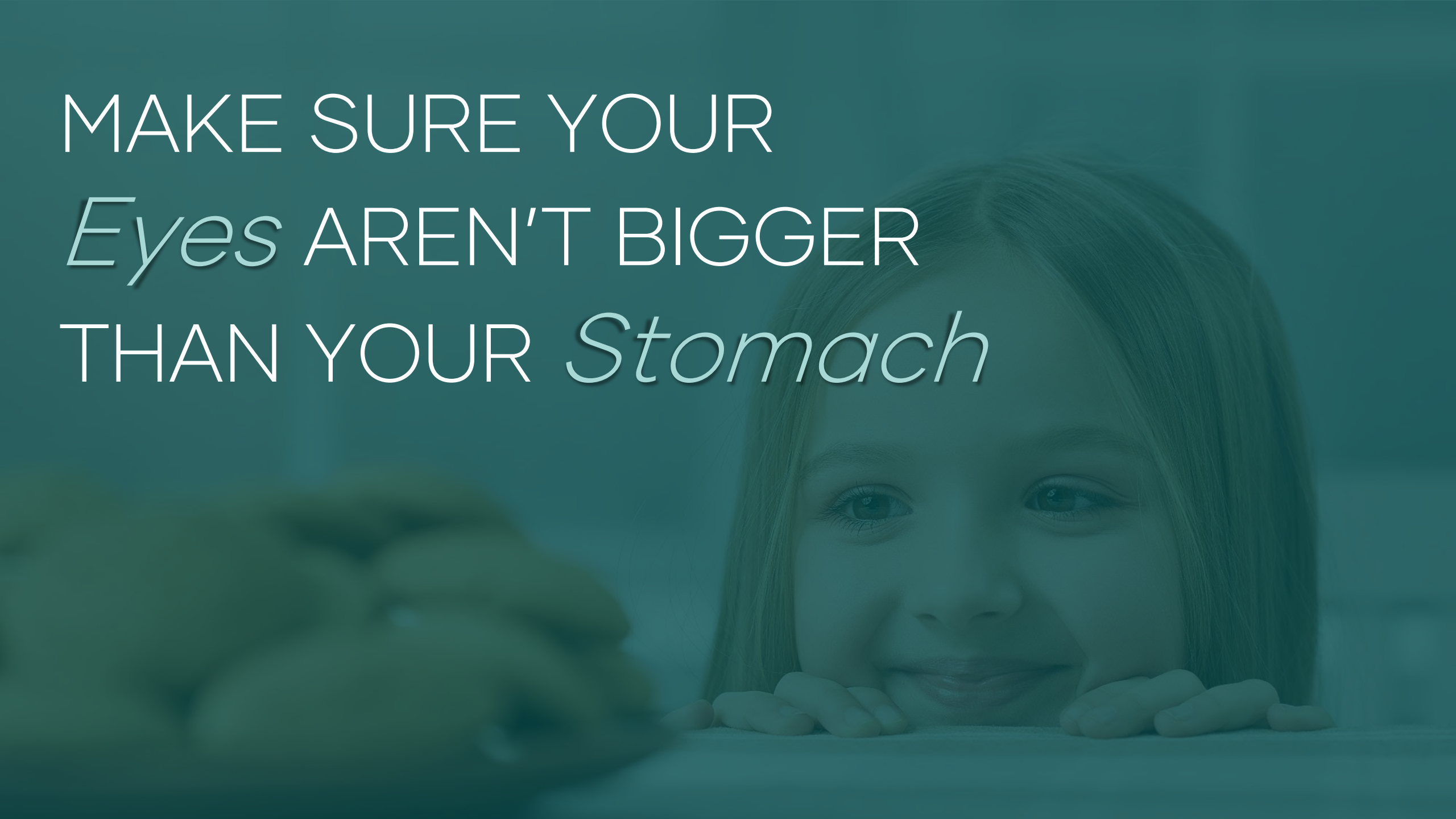
I'm clear on what I do, the value I deliver and how I can best help

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*



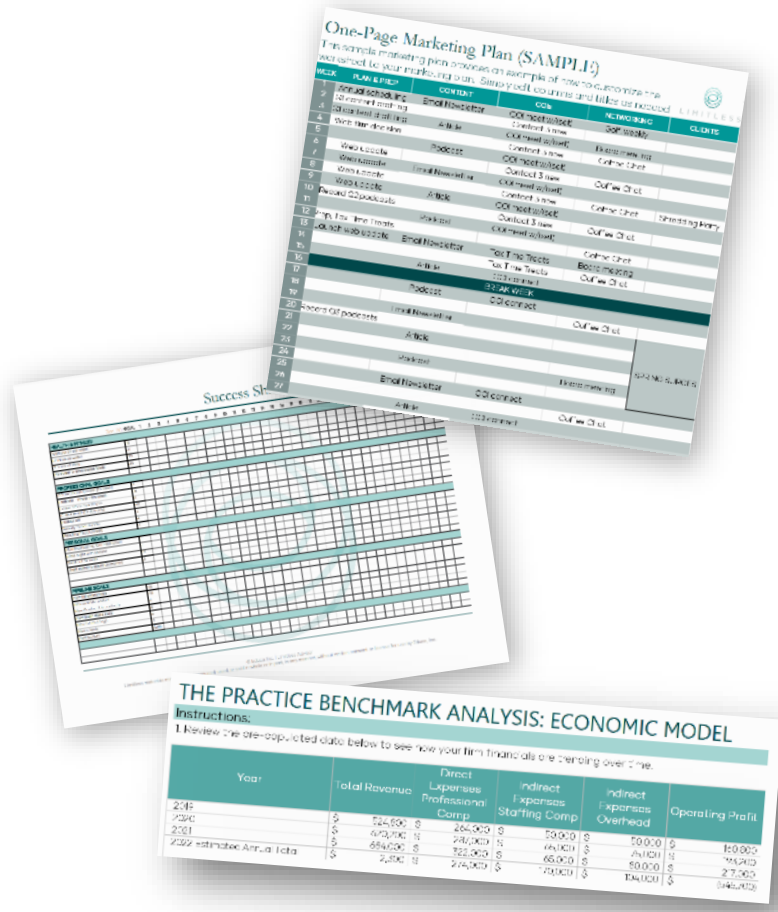
# CLARITY

- Marketing Action Playbook
- 1 Page Business 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.



# MARKETING MOMENTUM PROCESS

#1 TURN BIG STRATEGIES  
INTO SMALL TASKS

#2 TAG YOUR TEAM

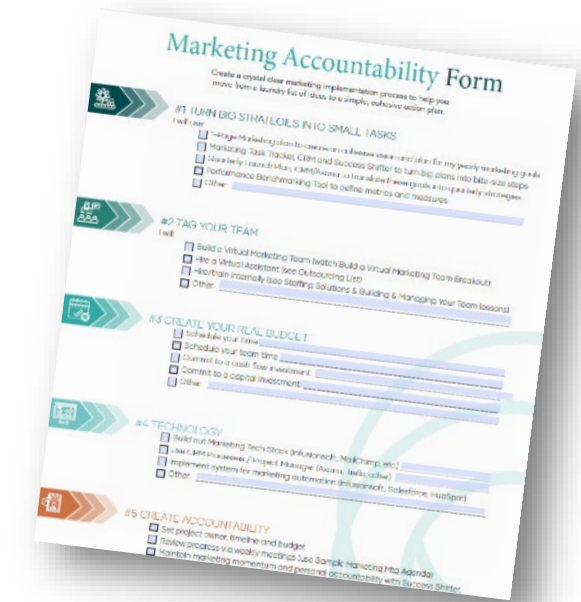
#3 CREATE YOUR REAL BUDGET

#4 LEVERAGE TECHNOLOGY

#5 CREATE ACCOUNTABILITY

#6 KNOW YOUR PIPELINE

#7 TRACK AND MONITOR SUCCESS



The image shows a 'Marketing Accountability Form' with a title and a subtitle: 'Create a crystal clear marketing implementation process to help you move from a hazy list of ideas to a simple, cohesive action plan.' The form is divided into seven sections, each corresponding to a step in the marketing momentum process. Each section has a small icon and a list of tasks with checkboxes. The sections are: #1 TURN BIG STRATEGIES INTO SMALL TASKS, #2 TAG YOUR TEAM, #3 CREATE YOUR REAL BUDGET, #4 TECHNOLOGY, #5 CREATE ACCOUNTABILITY, #6 KNOW YOUR PIPELINE, and #7 TRACK AND MONITOR SUCCESS. The form is tilted and has a drop shadow, giving it a 3D appearance.



DOWNLOAD YOUR  
Marketing Accountability Form  
in the chat



# #1 TURN BIG STRATEGIES INTO SMALL TASKS

TRANSLATE  
BROAD  
STRATEGIES

NOTES &  
SCRIBBLES

DISCUSSIONS  
& FEEDBACK

MARKETING  
MINDMAP

MARKETING  
PLAYBOOK



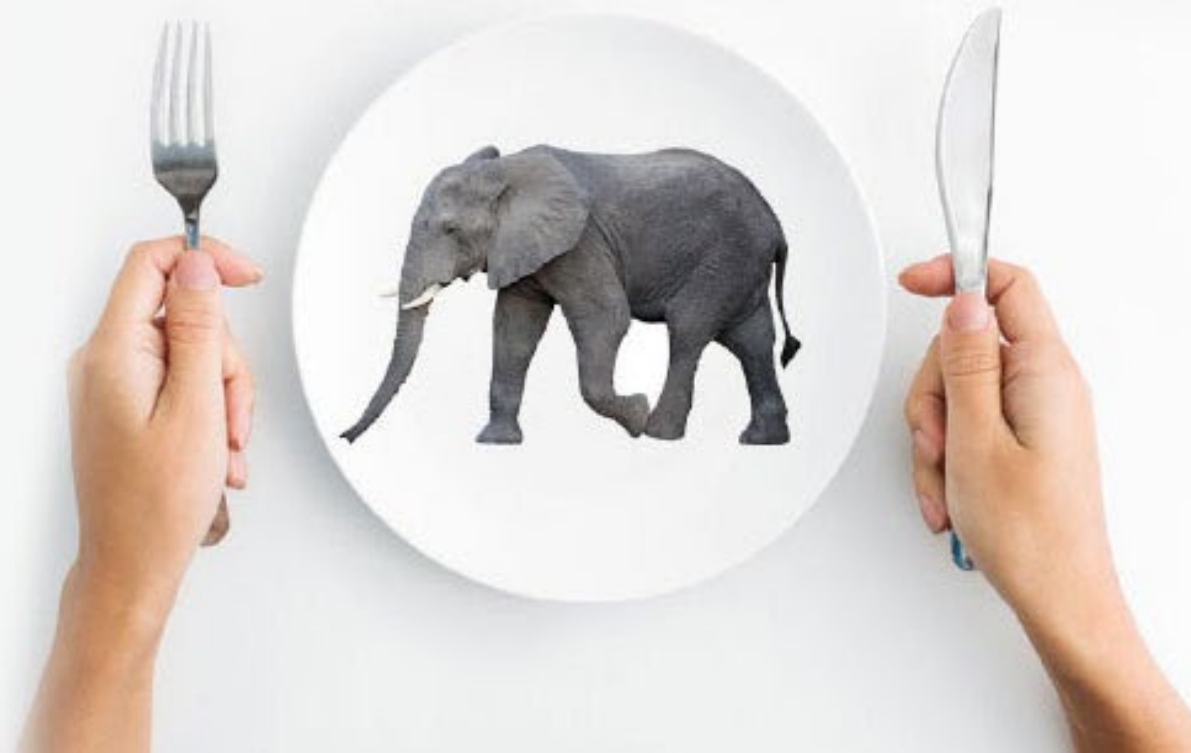
INTO  
SPECIFIC  
TASKS

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

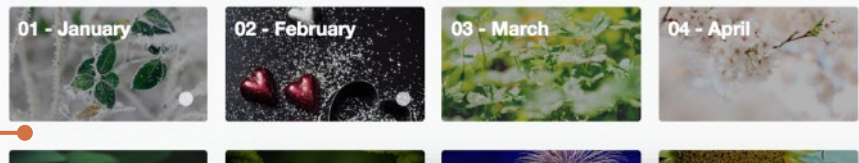
### *Tip:*

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





# #4 LEVERAGE TECHNOLOGY



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

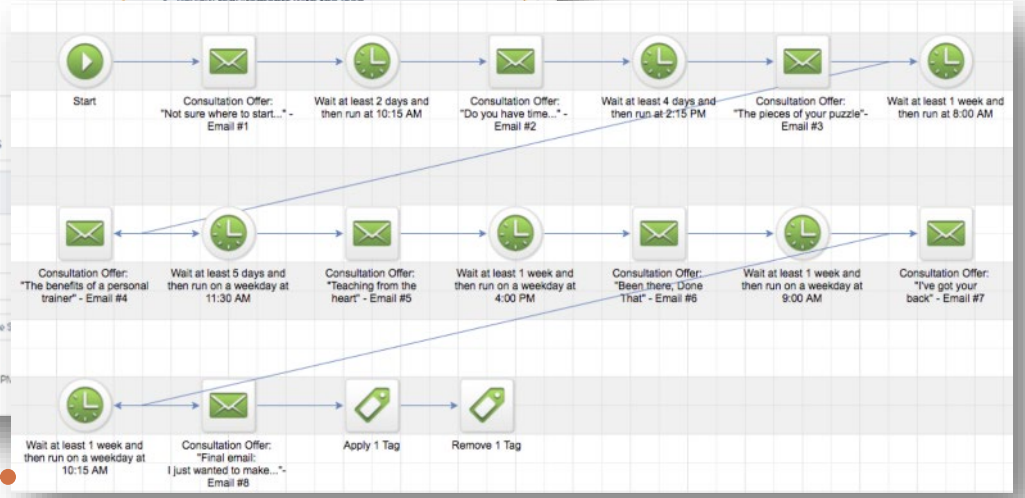
Needs Analysis Proposal Negotiation Closed

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

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

ACTIVITY COLLABORATE DETAILS

Next Steps: Internal opportunity team preparation meeting



Use project management tools

Set tasks with due dates

Track leads and prospects in your CRM

Marketing automation



## New Business Summary

Instructions: Understanding your opportunity pipeline and the source of new business can clarify the effectiveness of your marketing efforts and help you determine your return on marketing. This workbook is a template that you can customize to create your own new business tracking tool. It has been populated with example data to give you a starting point to work with. The data tables below are Pivot Tables that you can customize to show data you feel is important. Remember, each time you add new data, you will need to refresh all Pivot tables for the data to update.

**Opportunity Pipeline**

Number of Leads	5000	Manually entered	
Number of Prop	5	0.1%	Conversion Rate
Number of New C	1	20%	Closing Ratio

**Prospects by Source**

Row Labels	Count of Source
Client Referral	2
Client Referral	1
Website	1
Podcast	1
<b>Grand Total</b>	<b>5</b>

**Won/Loss by Source**

Count of Source	Column 1	Column 2	Pending	Grand Total
Client Referral	1			1
Client Referral		1		1
Website			1	1
Podcast			1	1

### Success Shifter

HEALTHY HABITS	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Exercise 30 minutes													
Drink 8 glasses of water													
Read 15 minutes													
Practice gratitude journaling													
PROFESSIONAL GOALS													
Get a promotion or raise													
Complete a certification													
Grow your client base													
Develop a new service													
PERSONAL GOALS													
Travel to a new location													
Learn a new skill													
Read 12 books													
Save money for a goal													
FINANCIAL GOALS													
Pay off credit card													
Invest in a new asset													
Grow your net worth													
Save for retirement													
Pay off student loans													
Grow your business													

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FOR INDIVIDUALS

# #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)

### 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

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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 by 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	Name	Source Type	Referral Source	Referred Name	Stage	Date Received	Initial call/mtg?	Date	Qualified?	Not Qualified	Client Referred to?	Status	Net Worth	Potential AUM
Jones	J.S. Smith	COI Referral	CPA	J. Hansen	New Client	12/29/2019	Qualifying Call	1/2/2019	Qualified	N/A	Yes	#####	\$ 2,000,000	
Jones	M. Kelly	Website	n/a		Lead	1/2/2019	Pending			N/A	Pending	#####		
Jones	R. V. Ito	Podcast	n/a		Prospect	1/7/2019	In Person	1/27/2020		N/A	Pending	#####	\$ 1,500,000	
Jane	P. Nutt	COI Referral	EP Attorney	K. M. Huff	Lead	1/2/2019	Pending			N/A	Pending			
Jane	M. Kenney	Client Referral	Client	J. S. Smith	Prospect	11/7/2019	In Person	11/15/2019	Not Qualified	XVFN	Lost	#####	\$ 250,000	



# #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  
Advisor-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

# MARKETING ACTION PLAYBOOK

Limitless Advisor Coaching Program

LIMITLESS

## Marketing Action Playbook

**STEP 2: SELECT YOUR MARKETING STRATEGIES & ACTIVITIES**  
 Your marketing activities can be summarized to include three areas of the marketing wheel: personal marketing, brand messaging and digital marketing. In each of these three areas, you have a variety of activities you can pursue.



### COI REFERRAL

BUILD REFERRAL RELATIONSHIPS WITH COIS

WHAT PRE-MARKETING ACTIONS DO YOU NEED TO TAKE?  Yes  No

- Gather names of all current client COIs, by type (CPA, Attorney, etc.)
- Build a COI dream team list
- Draft introduction scripts and practice them
- Create a 12 mo. communications calendar
- Build a COI information process to gather personal and professional information on your COIs
- Connect with your COIs on social media



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# ONE-PAGE MARKETING PLAN

**Instructions:** Once you've completed your Marketing Action Playbook, use this simple planning tool to map out your marketing playbook for the year. Next, schedule activities into your annual, monthly and weekly schedules to execute and manage your plan. Customize to suit your plan categories.

WEEK	PREP	CONTENT	SOCIAL MEDIA	EMAIL NURTURE	NETWORKING	COIs	EVENTS	OTHER
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								

## One-Page Marketing Plan (SAMPLE)

This sample marketing plan provides an example of how to customize the worksheet to your marketing plan. Simply edit columns and titles as needed.

WEEK	PLAN & PREP	CONTENT	COIs	NETWORKING	CLIENTS	
1	Annual scheduling					
2	Q1 content drafting	Email Newsletter				
3	Q1 content drafting		COI meet w/(set) Contact 3 new	Golf, weekly		
4	Web firm decision	Article	COI meet w/(set) Contact 3 new	Board meeting		
5		Podcast	COI meet w/(set) Contact 3 new	Coffee Chat		
6	Web update		COI meet w/(set) Contact 3 new	Coffee Chat		
7	Web update	Email Newsletter	COI meet w/(set) Contact 3 new	Coffee Chat		
8	Web update		COI meet w/(set) Contact 3 new	Coffee Chat		
9	Web update	Article	COI meet w/(set) Contact 3 new	Coffee Chat	Shredding Party	
10	Record Q2 podcasts	Podcast	COI meet w/(set) Contact 3 new	Coffee Chat		
11	Prep, Tax Time Treats					
12	Launch web update	Email Newsletter	Tax Time Treats	Coffee Chat		
13		Article	Tax Time Treats	Board meeting		
14			COI connect	Coffee Chat		
15		Podcast	BREAK WEEK			
16			COI connect			
17						
18						
19						
20	Record Q3 podcasts	Email Newsletter		Coffee Chat		
21		Article				
22		Podcast				
23						
24						
25						
26		Email Newsletter	COI connect	Board meeting	SPRING SURGES	
27		Article	COI connect	Coffee Chat		



## LEARN MORE

- 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
- The Power of Practice Management: Best Practices for Building a Better Advisory Business, Stephanie Measure
- What Matters: Rock The World With OKRs , John Doerr



## ADAPT & APPLY

- Use your Marketing Action Playbook to decide where you most need to focus.
- Turn your 1-Page Marketing Plan into action items using the Marketing Task Tracking Tool or your CRM
- Block out your Q4 schedule using the Template Annual Calendar and Weekly Schedule Sample



## TAKE ACTION

- Track and monitor your marketing results with the Success Shifter and New Business Tracker Tool
- Use your 1-page Marketing Plan to guide your marketing efforts each week and month.



LIMITLESS Q&A