

KICK START YOUR MARKETING

Revenue-Producing Activities

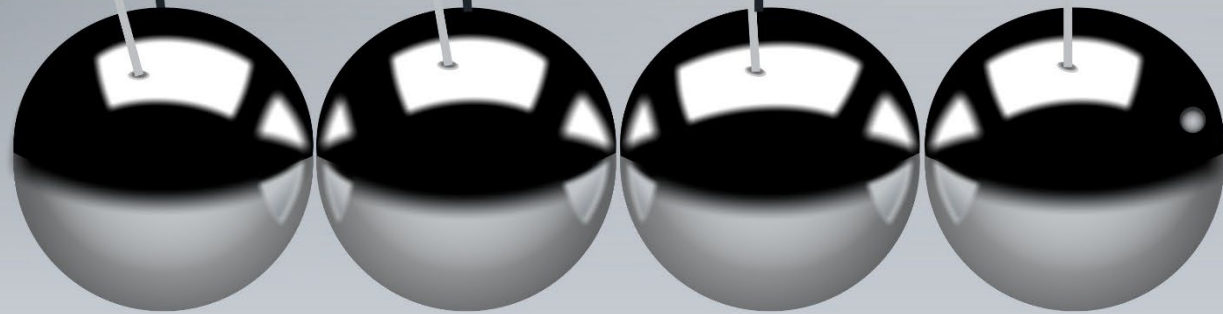
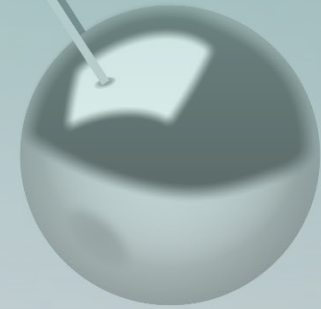


TIFFANY
CHARLES

slido
#Grow2

BIG IDEA

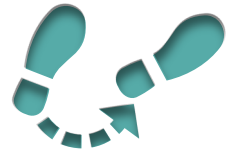
Force = Mass x Acceleration



A BODY IN MOTION... *STAYS IN MOTION*

UNLESS ACTED UPON BY AN
EQUAL OR OPPOSITE FORCE

ACTIONABLE INSIGHTS



TIME COMMITMENT



REVENUE-PRODUCING ACTIVITIES:

- Activities that move you toward your business & income goals
- Activities that produce revenue



TAKE ACTION ON YOUR
1-PAGE MARKETING PLAN

JUST GET YOUR
SH*T STARTED



3-A-DAY CHALLENGE

EXAMPLES



Call 10 People a Day



Create 3 videos

- *Clients*
- *COIs*
- *Prospect Process*



ID/outreach to 3 new writing opportunities, etc.



Hold 1 COI lunch/
week

PRACTICE AND BUILD YOUR CONFIDENCE AS YOU GO.

"What challenges me today will be my warmup tomorrow."





1-PAGE MARKETING PLAN



DC MARKETING PLAN EXAMPLE

AUDIENCE Target Persona	STRATEGIES Marketing Goals	ACTIVITIES Marketing Channels	CONSERVATIVE BUDGET Client Worth / Avg. Revenue
Net Worth: \$5-\$50M Liquid Assets: \$2M+ In or Nearing retirement Entrepreneurial family (nearing or had final exit) Age 50+ Value advice	Total New Revenue from DC: \$200,000 by _____ Total New Client Revenue: \$100,000 by _____ Total Existing Client Revenue: \$100,000 by _____ # of New Clients: 3-8 # of On-Boarding Opportunities: 6-16 Increase our On-Boarding Conversion Rate to 80%	DIRECT * Client Referrals *Webinars * COI Relationships DIGITAL * Website Optimization * E-mail Marketing * SEO * Video Content Marketing * Social Media	Annual Client Fees: \$20,000 Average client tenure: 10 years Lifetime client revenue: 10 x \$20,000 = \$200,000 Annual profit margin: 25% Lifetime client value: 25% x \$200,000 = \$50,000 Client retention rate: 90% (2 out of 20 lost)
Customer Journey	Key Strategies	Tactics & Activities	Cost of Client Acquisition Calculation
STEP 1 - Identify a Need for Service - Triggering Event, Professional Recommendation, or Curiosity STEP 2 - Research - How can we solve their pain point? Do we understand them? STEP 3 - Engage - Follow or Reach Out STEP 4 - Prospect On-board - 2 to 3 meetings STEP 5 - Commit - Formally become a Client STEP 6 - New Client Onboard STEP 7 - Manage, Monitor, and Plan STEP 8 - Reflect - Does value continually exceed cost? STEP 9 - Lifetime Client	COI Relationships Client Referrals & Held away assets Webinars Website Development & Optimization Case Studies FAQ Downloads - Tax & Financial Advisor questions Assessment Results and messaging Sustainable Impact Strategies/ESG SEO	1. 5 COI influencers by _____ 2. Website create key messages & cont. build out. 3. Assessment results & email campaign. 4. Build Tax focus - downloads, FAQ, story 5. Consistent content - SEO	Sales & Marketing / # of New Client: \$100,000 / 5 = \$20,000 CAC: \$20,000 Lifetime Client Revenue/CAC = 10:1 Ratio Lifetime Client Value/CAC = 2.5:1 Ratio
Value Proposition	Pricing & Positioning	Measures of Success	
Expert team of advisors who specialize at integrating tax planning, investment management with an ESG focus, and financial strategies into holistic financial plans.	Competitive Pricing \$2M+ Tiered fees: \$1M = 1.5%, \$2-5M = .95% \$5M+ = .5% Minimum of \$2M in AUM	* Achieve Revenue and New Client Goals * 3 COIs that have introduced 2+ qualified clients * Have brand representation of tax and ESG. * Conversion rate is at 80%	



REVIEW TIFFANY'S SAMPLE MARKETING ACTIVITIES RESOURCES IN THE LIMITLESS LIBRARY

DESTINY CAPITAL MARKETING ACTIVITIES							
CHANNEL	SUB-CHANNEL	STRATEGY	COST	GEOGRAPHIC REACH	SUCCESS MEASUREMENTS	LEAD/ACCOUNTABLE	RESOURCES
DIRECT	Client Referrals	<ol style="list-style-type: none"> 1. Exceptional & proactive service 2. Surge client meetings 3. Present at meaningful life events. 4. Identify client advocates and create specialized experience. 	Proactive service built into salaries. Additional cost will be needed. Build out touch point communications and deliverables. Part of the \$1,000/mo project budget. Referral/Gifting: \$100/mo	Local	<ol style="list-style-type: none"> 1 Referrals coming in from clients are a measurement of client satisfaction. Retention and growth. 2 Baseline #s to be measured 3 Goal to get 3 client referrals per quarter per team 4 Increase in referrals from 1st year clients 5 Build client advocacy campaign that identifies and nurtures clients who refer. 	Strategists	
	Client Advisory Boards	Host 2 (Spring and Fall)	Proactive service built into salaries. \$2500 for Fall and \$2500 for Spring	Local	<ol style="list-style-type: none"> 1 Commitment from Clients & Participation of all 3 meetings 2 COI/Network introductions 3 Introductions to new clients 	CGO Strategists	
	COI Relationships	<ol style="list-style-type: none"> 1. Focus on 5-10 relationships each 2. Monthly touchpoints - Create campaign 3. Commitment or out by _____ 4. With established relationships, create value exchange opportunities 5. Become reliable referral resources and collaborators 	Time: 20-25 hours/mo (2hrs per week; per Strategist) Money: \$30,480-\$38,400 \$200/mo (\$2,400/yr) Total: \$32,880-\$40,800	Local	<ol style="list-style-type: none"> 1 1 qualified intro per COI per team 2 Have 3 influencers identified by _____ 	Strategists	
DIGITAL	Website	<ol style="list-style-type: none"> 1. Website is an optimal prospecting tool from lead to conversion. 2. Continued maintenance, build-out, and analyze 3. Learn trends and hot topics on the website to guide marketing and client experience 	Time: 18 hrs/yr (1.5hr/mo) Money: ? MKT Avg: \$250-\$750/mo Total: \$8,300	Local	<ol style="list-style-type: none"> 1. Daily visits, how they move through the website, call to actions, captured information, # of introductions scheduled. 2. Optimize SEO. Build FAQ and content. 3. Conversion rate - # of people who visit website submit form, sign up for email, or call. 	MV CGO EA	
	Email & Text Marketing	<ol style="list-style-type: none"> 1. Make the most of our existing lists. 2. Continually increase our list size. 3. Weekly content marketing. 4. Brand awareness, loyalty, and sales. 5. Funnels/campaigns for prospects, after events, etc... 6. Targeting emails based on lists. 	Time: 12 hours (1hr/mo) MNG \$1,536 Money: ? MKT Avg: \$300-\$1000/mo Total: \$7,500	Local	<ol style="list-style-type: none"> 1. Have designs and templates built out. 2. Consistent sends. 3. Baseline #s - open, reads, CTAs, and intro calls. 	MV CGO CSTs	
	SEO	<ol style="list-style-type: none"> 1. Identify key words that our niche search 2. Build rank and make us more easily found 3. Drive traffic to our website. 4. Important to building brand awareness and authority, start now. 5. Train content writers to SEO best practices 	Time: 12 hours (1hr/mo) MNG \$1,536 Money: ? MKT Avg: \$750-\$2,000/mo Total: \$10,500	Local	<ol style="list-style-type: none"> 1. Have key words identified 2. See traffic to our website through SEO keywords. 3. Baseline #s 4. Clear direction on keywords. What's working and what's not. 	MV CGO	
				Time: 12 hours (1hr/mo) MNG		1. Stimulates Engagement	
CLIENT EXPERIENCE PROJECTS	Retirement Campaign	<ul style="list-style-type: none"> * Campaign to being 1/1/2021-9/30/2021 * Need to communicate our team, processes in place, and help transition emotional tie to Advisor. * Needs to bring comfort, clarity, safety, and support for Steve. 					
	Year-End Reflection / Year Ahead Letter	<ul style="list-style-type: none"> * Email communication. * Filter response. 					
	On-Boarding Workflow/ Funnel	Email scripts and workflow for in between on-boarding meetings. One-pagers - Questions to ask your advisor, roadmap of all services, Ebook of services.					

BIG LIST: Revenue-Producing Activities

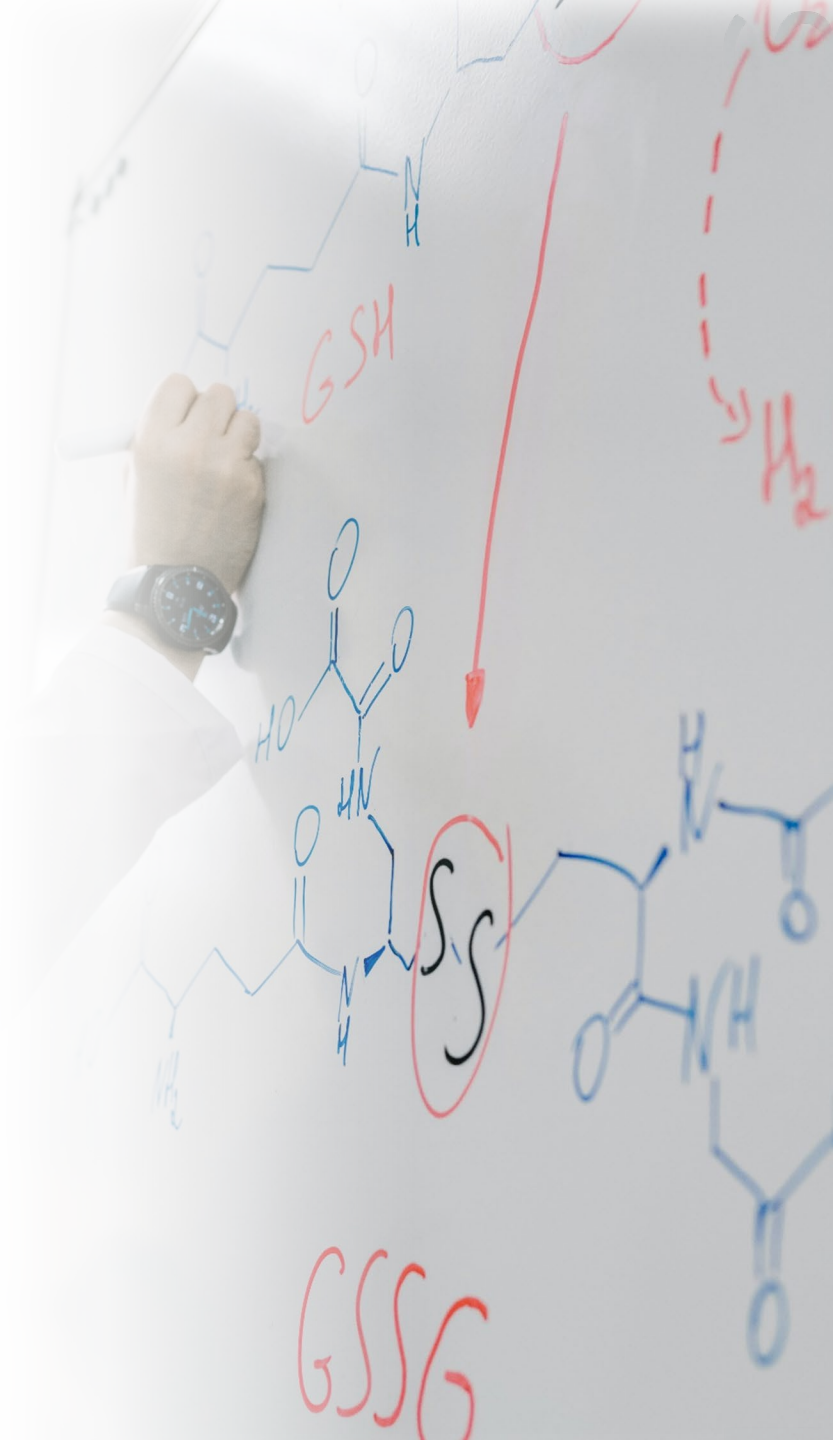
- Cold-calling
- Sending proposals
- Emailing your list an offer
- Sending out an affiliate offer
- Asking current clients for referrals
- Asking past clients for referrals
- Following up with referrals
- Setting up product demos
- Answering new lead inquiries
- Write a book
- Podcast interviews
- Comment actively on chat boards
- Asking current clients for referrals
- Asking past clients for referrals
- Following up with referrals
- Setting up product demos
- Answering new lead inquiries

Revenue Producing Activities (RPAs): Activities that move you towards your business and income goals; Activities that produce revenue.

Eligible	Points	Not Eligible
Client Experience		
Convert New Client	3	On-boarding prep Client review meetings
Client on-boarding meetings	2	
Hosting Introduction calls	2	
Client meetings with AUM conversions	2	
Converting over \$2M or \$20,000 in revenue	3	
Drafting "Niche" deliverables & modules	1	
Seeding intros in reviews & in-person meetings	1	
Client feedback meetings	1	
Marketing and Digital Strategies		
Writing or filming original content	1	Content e-mailed out to clients
Intentionally forward content w/ personal note to COI, lead, or prospect. Include call to action.	1	Posting to social media accounts
Drafting "Niche" deliverables & hook pieces	1	
Create automation in lead generation strategies	1	
Creating a download or lead capture piece	1	
Business Development		
Personal follow up with a lead	1	Administrative tasks
Set a meeting with a lead	1	Client service work
Meeting with a COI	2	Internal company meetings
Intentional Follow up with a COI	1	Client appreciation event
Make an introduction to a COI	1	Client education events
COI group meetings	2	Client special occasion gifts
Networking groups & organizations w/ growth goals	2	Volunteering
Networking events in Niche or COI	2	Simply going to a networking event
Board Meetings w/ Niche	1	
Hosting prospect presentations	2	
Set an opportunity to speak to a group	1	
Speaking at external presentations	2	
Client advisory board meetings	2	
Send thank you for referral gift	1	
Advisor meetings	1	
Niche specific research & feedback meetings	2	
Cold calling	1	
Growing lead/COI pipeline	1	
Hobby related prospecting	2	
Roundtable Events	2	



TIME TO BRAINSTORM





LIMITLESS Q&A