# Compelling

# CONTENT MARKETING

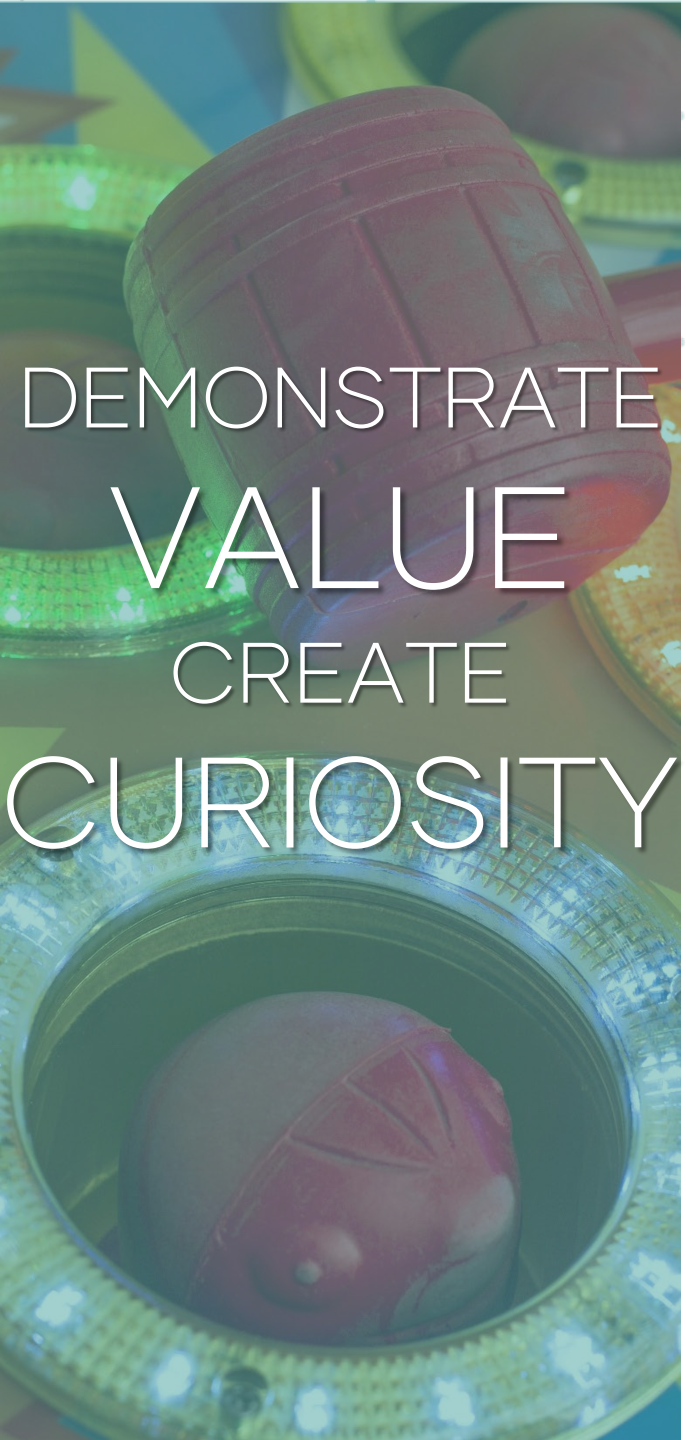
STEPHANIE BOGAN

JARROD MUSICK

# SYSTEMS = CONSISTENCY

- ✓ Direct way to demonstrate value
- ✓ Can be a huge distraction
- ✓ Experience is everything

LIMITLESS

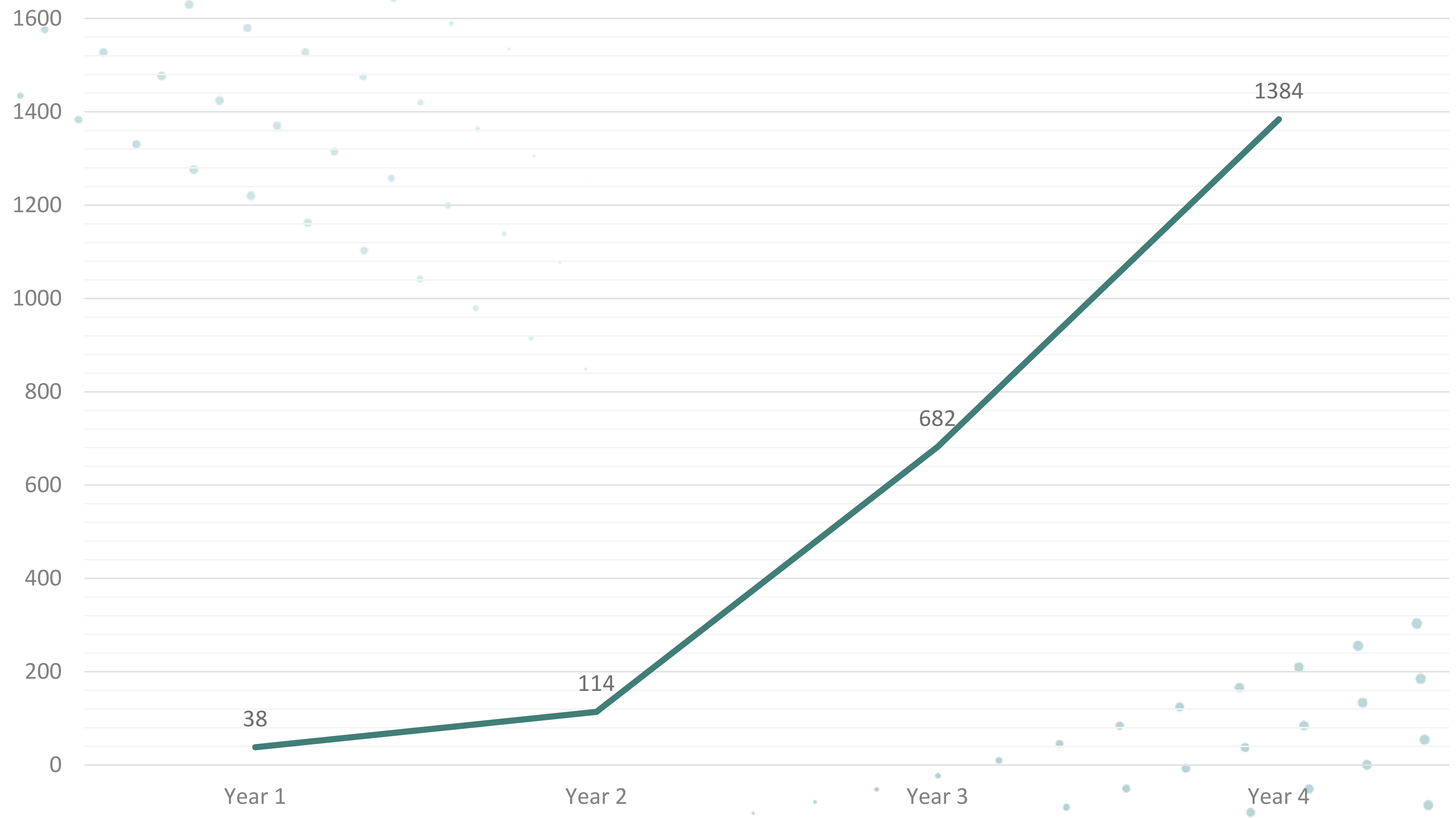


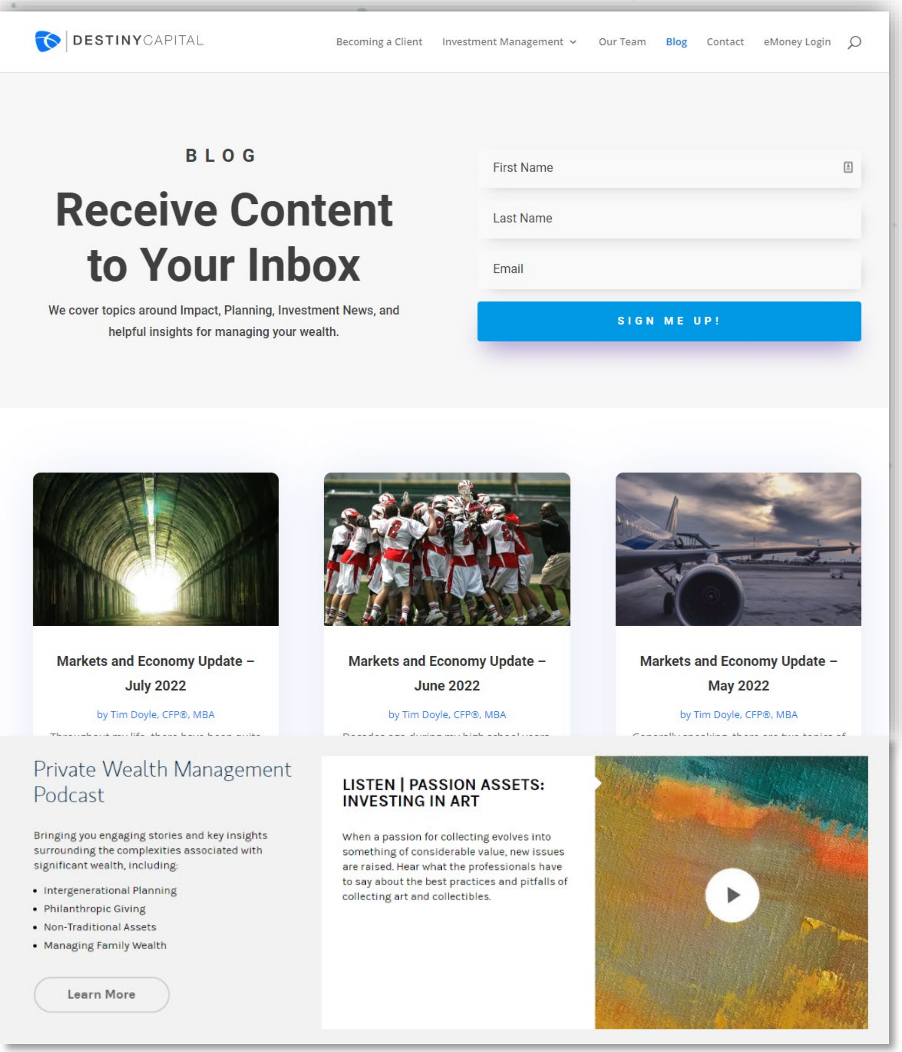

# THE 10 RULES OF

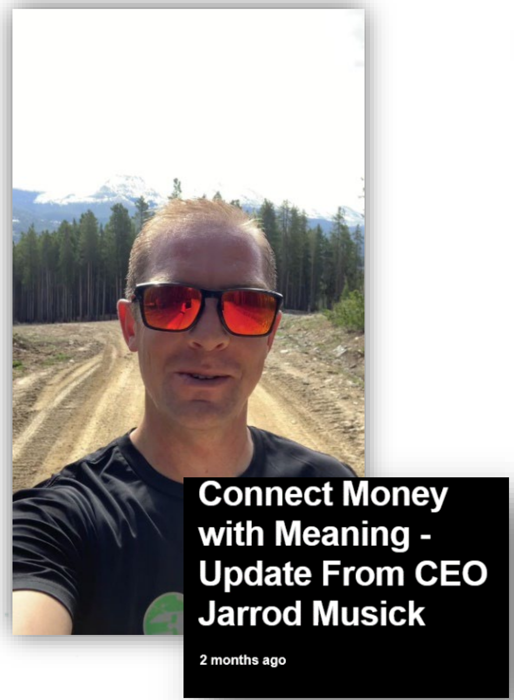
# *Content Marketing….*

1. Find your following
2. Deliver value in excess of the sale
3. Be obsessed about your audience
4. Radically relevant
   - Charlie Brown's mom – don't be squishy
   - Crap stinks
5. Be real, not refined
6. Have a 1-track mind = email
7. Consistency compounds
8. It's all about….
9. Rip off, repurpose & remarket
10. Just do it

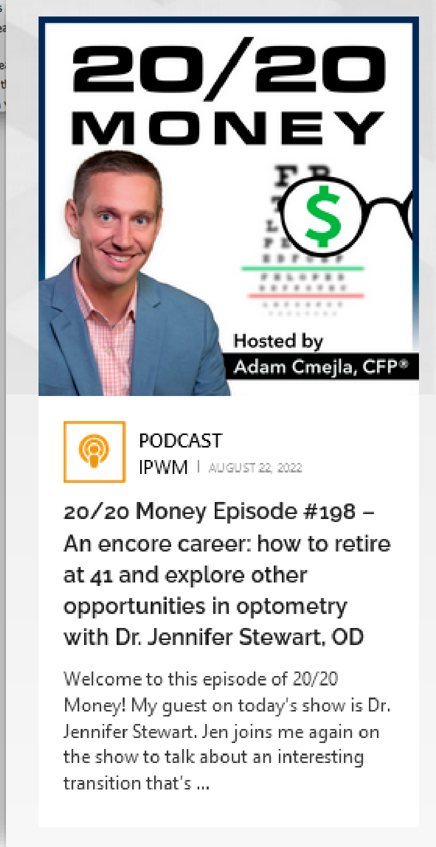
# Sample Content Reach Over Time

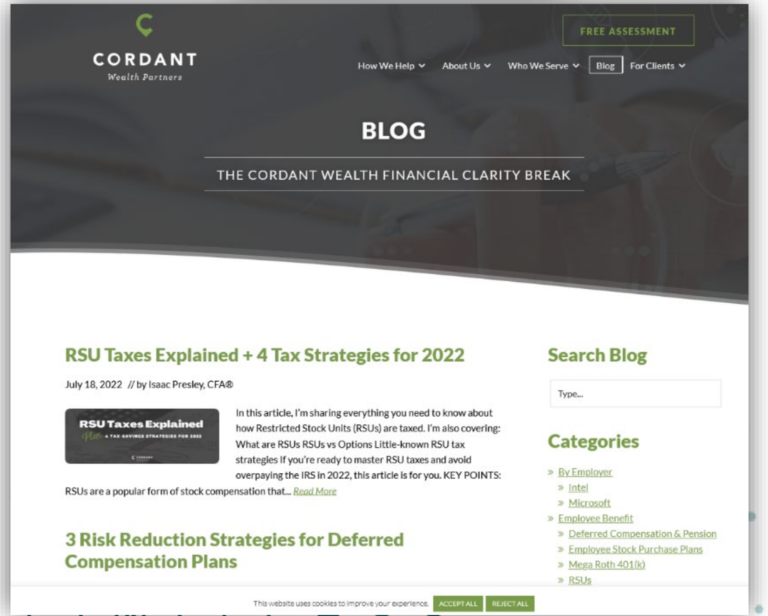









# "What you do, do naturally for 3 years."

-Jarrod

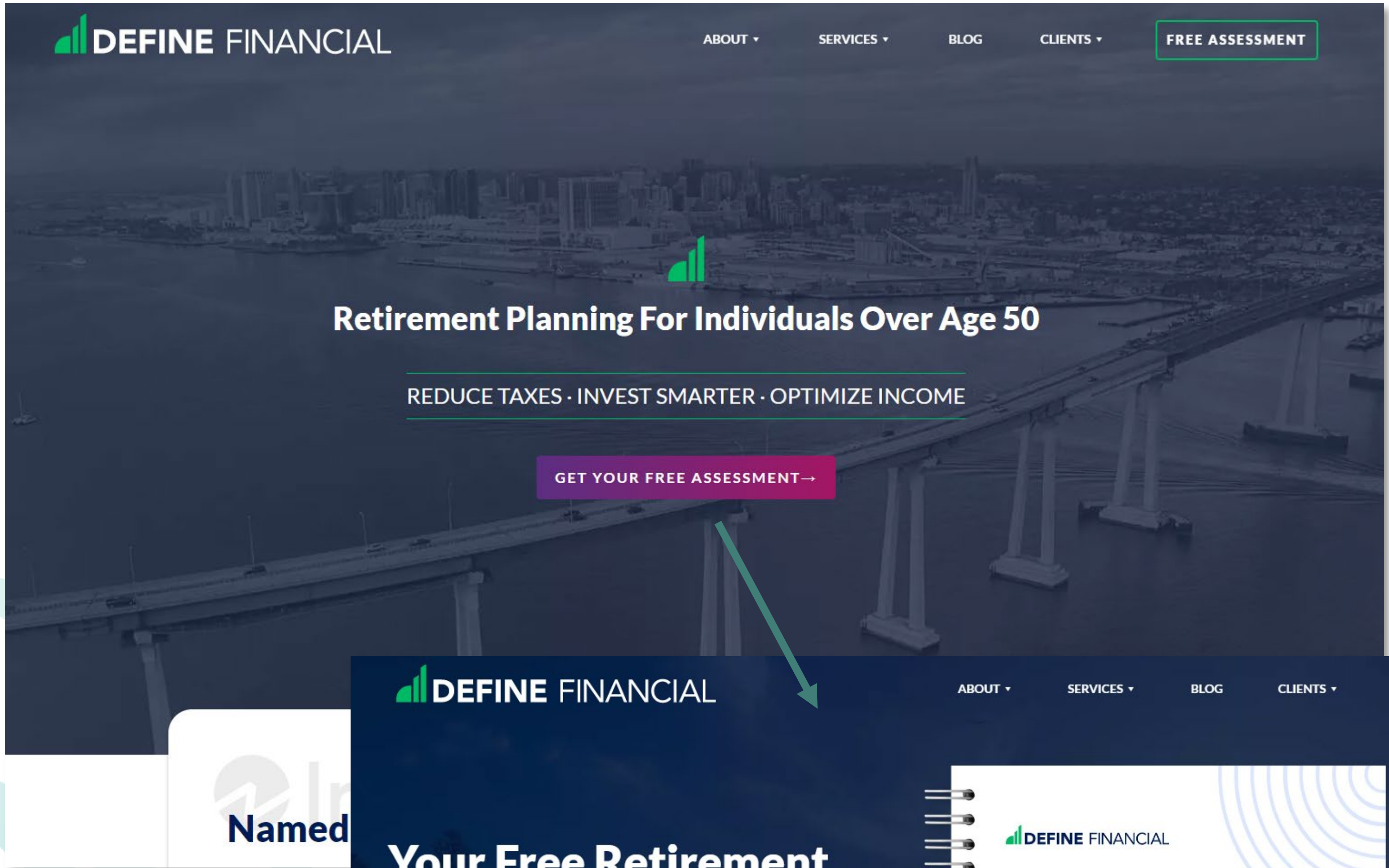
# WHAT MAKES A *Good Call to Action?*

- Interesting
- Relevant
- Think less "CLICK HERE" and more "Schedule your Free Call"
- Active verbs & short, punchy phrases

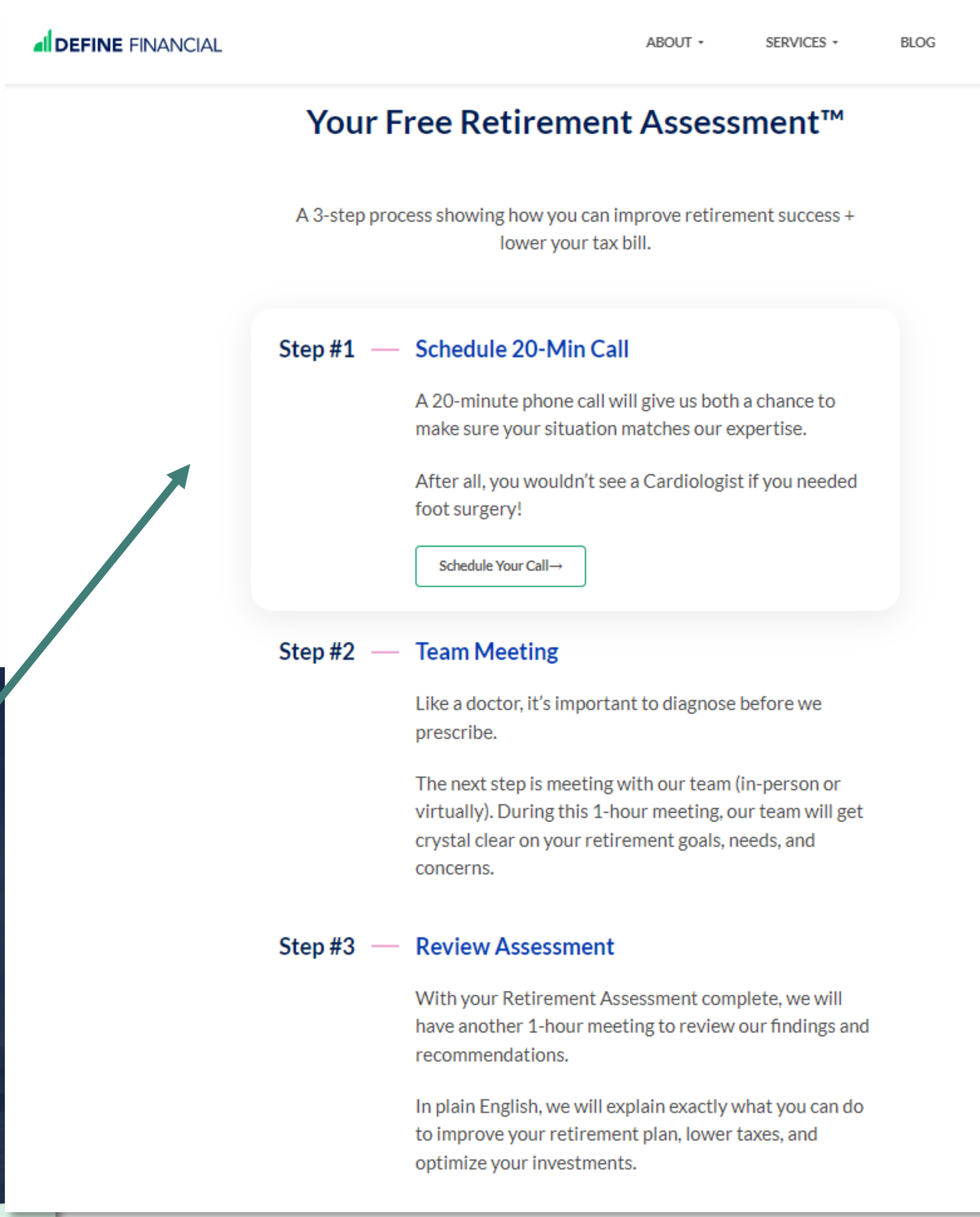
**Download our guide: *How to Make $100,000 Per Year with 150 Clients.***

We'll show you exactly how the best gym owners are earning six figure incomes from single location gyms with no more than 150 members.

DOWNLOAD THE GUIDE








# OFFER INCENTIVES / NEXT STEP

### Think About It!

At the end of this process, we will simply ask you to ***think about it.*** We are looking for long-term relationships, not a quick transaction. If you decide that we aren't a good fit, we will happily help you find another professional with the right expertise. **There is never a hard-sell or pressure to say "yes."**

## Step #1: Schedule 20-Minute Phone Call

Click Here to Schedule →

## Step #1: Schedule Your 20-minute Phone Call

The purpose of this call is to answer your questions and ensure our expertise matches your needs.

1 Choose Appointment

**Step 1 - Intro Phone Call With Define Financial** ( 20 minutes )

This is NOT a sales call. The purpose of this call is to answer your questions + determine if there is a potential fit between our expertise and your needs.

After we hang up, you will have one simple question to answer: "Does it make sense for Taylor and his team to create a Free Retirement Assessment & Tax Analysis for me?"

YOUR TIME ZONE

(GMT-4:00) Eastern Time

< PREVIOUS | MORE TIMES >

| IN 3 WEEKS | | IN 4 WEEKS | | |
|---|---|---|---|---|
| Wednesday September 7 | Thursday September 8 | Tuesday September 13 | Wednesday September 14 | Thursday September 15 |
| | | | | 1:30pm |
| | | | | 2:00pm |
| | | | | 2:30pm |
| | | | | 3:00pm |
| | | | | 3:30pm |

## Still Have Questions? Keep Reading...

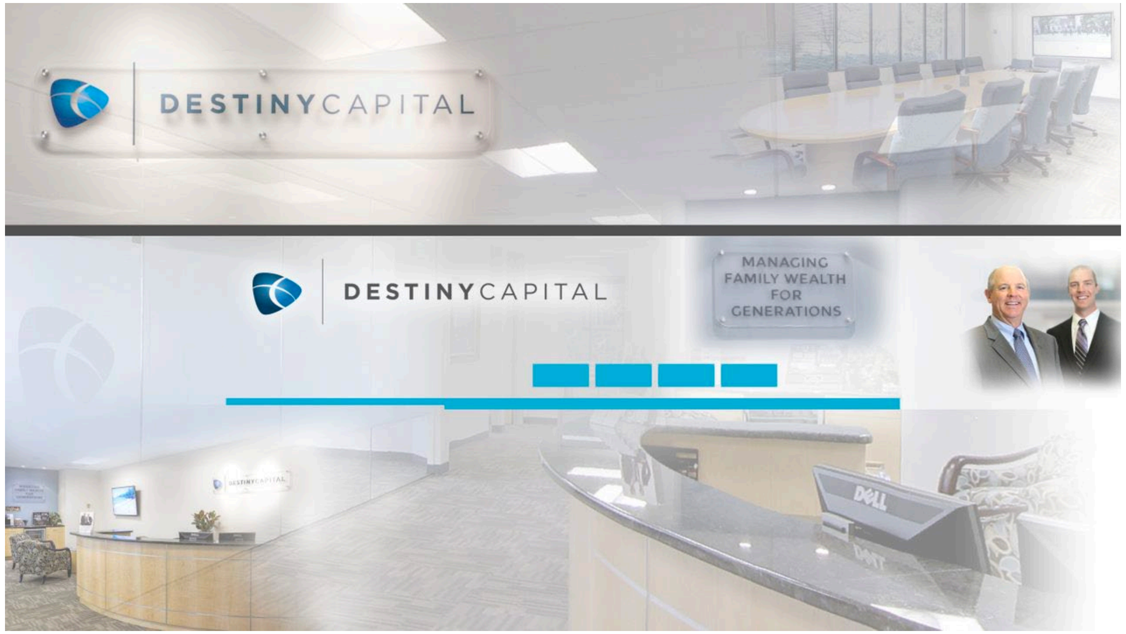
# Email is King.

## Not quite ready to schedule an appointment? That's OK!

Sign up for our quarterly newsletter

Join Now

# WE ALL GOTTA START SOMEWHERE…




A banner image for YouTube that says nothing about the client, who we served, or what we did. Just a picture of us and our office…

*- Jarrod*


"Bad lighting, dark backdrop, scanner and files on the desk, cheap white board…ugh…"

*-Adam*

# BUILD A *Permission Asset*

It's an attention economy | You have to get permission to enter
Email is Permission | Deliver value

## TWO STEPS:

1. They have to know they need help.
2. They have to be curious, have challenges and be convinced you are the one to help in order for your content to be a catalyst for action.

# TAKE Action
## Don't MAKE Excuses

"I don't know what to talk about."
"Someone has already done this."
"It's not good enough."
"What will people think?"

BE RIGHT


OF THE TIME

IT DOESN'T HAVE TO BE PERFECT
TO BE GOOD.

# DO YOU HAVE *What it Takes* TO BE A CONTENT MARKETER

Do you read, listen to podcasts, watch speakers?

Do you think about what you learn?

Could you write down or record thoughts about what you think about what you learn?

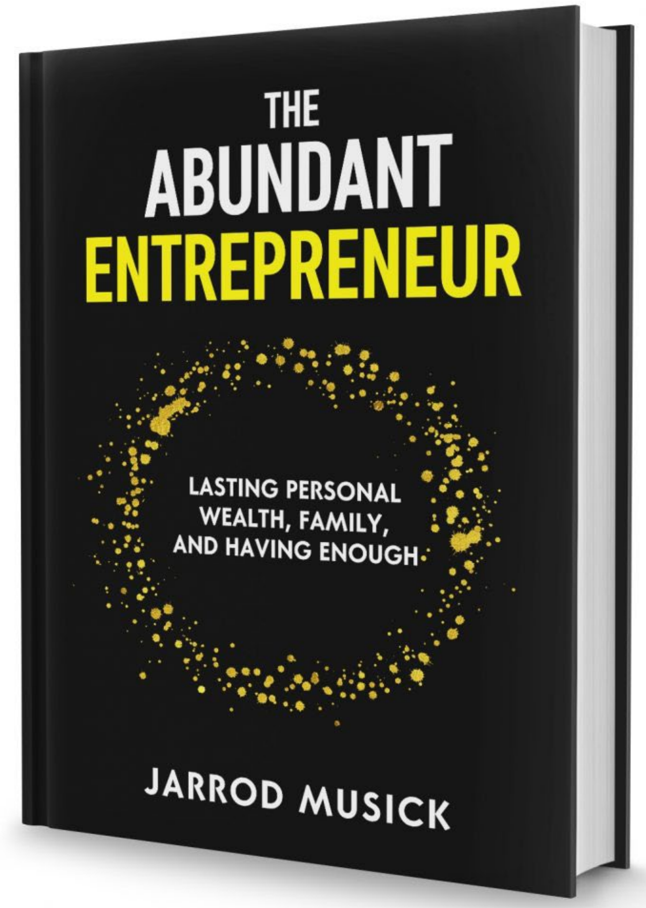
# 4 STEPS TO SUCCESS

WRITE DOWN WHAT YOU READ/SEE/HEAR

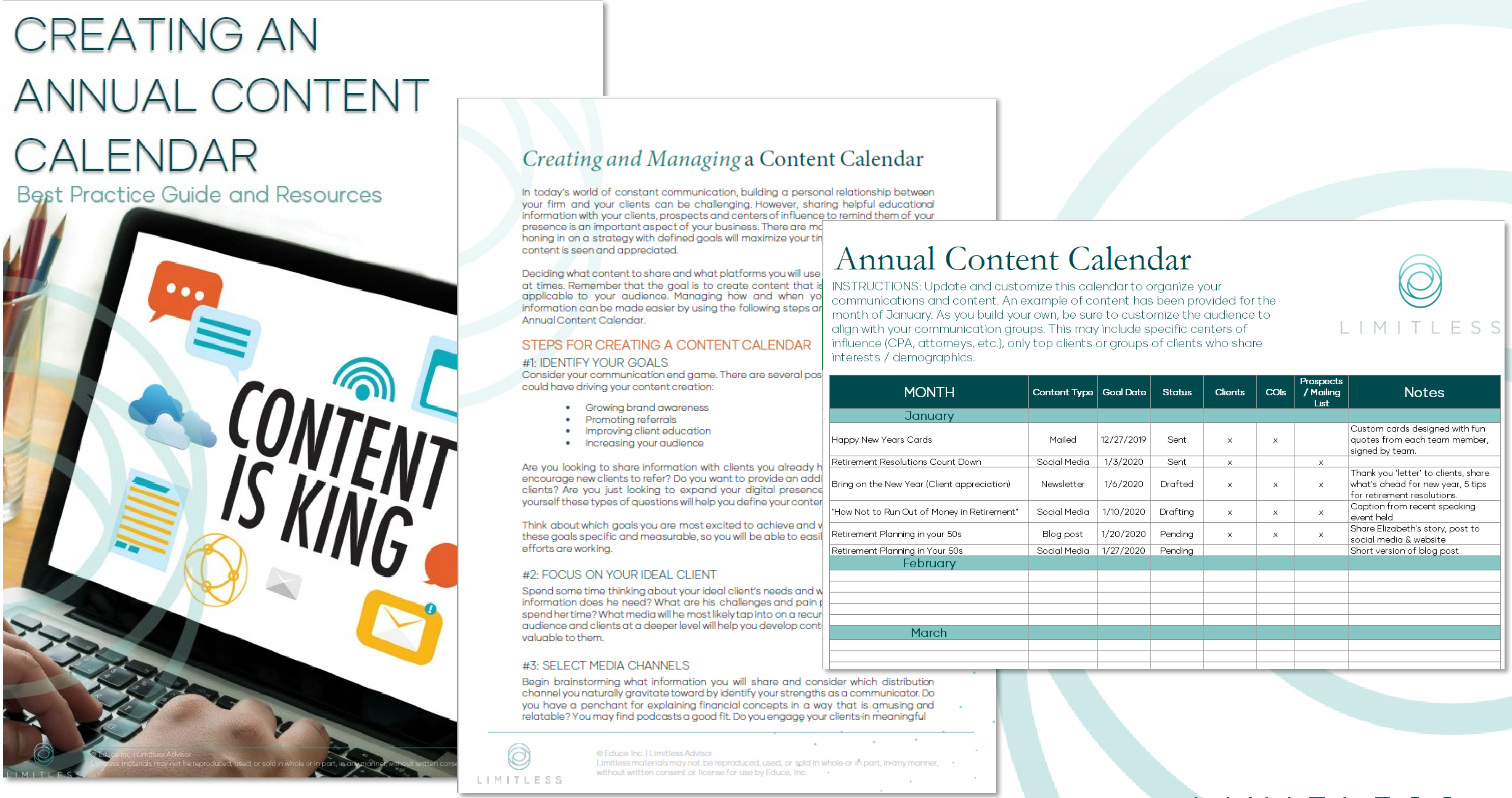
PUT YOUR SPIN ON IT

SEND IT OUT

REMIX CAN BE BETTER THAN THE ORIGINAL




# *Why Wouldn't*
# YOU DO THIS?
(WHY ARE YOU STUCK?)



# CREATING AN ANNUAL CONTENT CALENDAR

Best Practice Guide and Resources



## *Creating and Managing* a Content Calendar

In today's world of constant communication, building a personal relationship between your firm and your clients can be challenging. However, sharing helpful educational information with your clients, prospects and centers of influence to remind them of your presence is an important aspect of your business. There are mo honing in on a strategy with defined goals will maximize your tin content is seen and appreciated.

Deciding what content to share and what platforms you will use at times. Remember that the goal is to create content that is applicable to your audience. Managing how and when yo information can be made easier by using the following steps ar Annual Content Calendar.

STEPS FOR CREATING A CONTENT CALENDAR

#1: IDENTIFY YOUR GOALS

Consider your communication end game. There are several pos could have driving your content creation:

- Growing brand awareness
- Promoting referrals
- Improving client education
- Increasing your audience

Are you looking to share information with clients you already h encourage new clients to refer? Do you want to provide an addi clients? Are you just looking to expand your digital presence yourself these types of questions will help you define your conter

Think about which goals you are most excited to achieve and w these goals specific and measurable, so you will be able to easil efforts are working.

#2: FOCUS ON YOUR IDEAL CLIENT

Spend some time thinking about your ideal client's needs and w information does he need? What are his challenges and pain p spend her time? What media will he most likely tap into on a recur audience and clients at a deeper level will help you develop cont valuable to them.

#3: SELECT MEDIA CHANNELS

Begin brainstorming what information you will share and consider which distribution channel you naturally gravitate toward by identify your strengths as a communicator. Do you have a penchant for explaining financial concepts in a way that is amusing and relatable? You may find podcasts a good fit. Do you engage your clients in meaningful



## Annual Content Calendar

INSTRUCTIONS: Update and customize this calendar to organize your communications and content. An example of content has been provided for the month of January. As you build your own, be sure to customize the audience to align with your communication groups. This may include specific centers of influence (CPA, attorneys, etc.), only top clients or groups of clients who share interests / demographics.

| MONTH | Content Type | Goal Date | Status | Clients | COIs | Prospects / Mailing List | Notes |
|---|---|---|---|---|---|---|---|
| January | | | | | | | |
| Happy New Years Cards | Mailed | 12/27/2019 | Sent | x | x | | Custom cards designed with fun quotes from each team member, signed by team. |
| Retirement Resolutions Count Down | Social Media | 1/3/2020 | Sent | x | | x | |
| Bring on the New Year (Client appreciation) | Newsletter | 1/6/2020 | Drafted | x | x | x | Thank you 'letter' to clients, share what's ahead for new year, 5 tips for retirement resolutions. |
| "How Not to Run Out of Money in Retirement" | Social Media | 1/10/2020 | Drafting | x | x | x | Caption from recent speaking event held |
| Retirement Planning in your 50s | Blog post | 1/20/2020 | Pending | x | x | x | Share Elizabeth's story, post to social media & website |
| Retirement Planning in Your 50s | Social Media | 1/27/2020 | Pending | | | | Short version of blog post |
| February | | | | | | | |
| March | | | | | | | |

LIMITLESS

LIMITLESS

## LEARN MORE

- Coming Up With Content Ideas That Will Resonate With Your Clients And Prospects with Carl Richards, Michael Kitces
- Permission Marketing: Turning Strangers into Friends And Friends Into Customers, Seth Godin
- The Practice, Seth Godin
- Expert Secrets: The Underground Playbook for Creating a Mass Movement of People Who Will Pay for Your Advice, Russell Brunson

## ADAPT & APPLY

- Use the Annual Content Calendar Guide to help you plan and set up your own Annual Content Calendar
- Complete your 1-Page Marketing Plan and Marketing Action Plan
- Begin tracing your newest leads with the New Business Source Tracking tool
- Review the Sample Marketing Mtg Agenda

## TAKE ACTION

- Open a MailChimp / other email marketing CRM account
- Build your email list
- Send your introductory email
- Create a content creation process


LIMITLESS Q&A