

# Mapping Your MARKETING PLAN



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# THE ART & SCIENCE OF MARKETING THAT WORKS



The right  
message



to the  
right people



in the right  
place and time



Just Right  
Clients

- o Meet people where they are
- o Speak to their needs
- o Deliver a sticky message  
With a call to action for the  
"right" people
- o Lather, rinse, repeat...

# The Average Advisor's Plan

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# Limitless Advisor Marketing Plan

IF YOU WORK  
THE PLAN,



THE PLAN  
WILL WORK

# SHOW ME YOUR BUDGET

- How **IMPORTANT** is Growth to You?
- How Much do You **WANT** to Grow?
- How Much **TIME** are You Willing to Commit?
- How Much **MONEY** are You Willing to Invest?

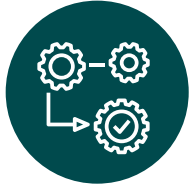




# Building your Marketing Action Playbook



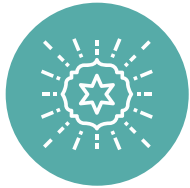
# SET YOUR GOALS



Define your goals



Bring on 10 new clients  
@ average of \$10,000 in  
revenue per client



Build brand awareness  
and credibility in community



Increase # of referrals from  
COIs and clients to #/AUM year

**Marketing Action Playbook**  
STEP 1: BUILD YOUR STRATEGY  
Define your overall marketing strategy by establishing goals, defining your audience and setting your budget.

**GOALS**  
What are the goals and objectives of your marketing activities?  
Below are some examples you can choose or you can set your own goals.

How will you measure your success?

- Add \_\_\_ new client relationships generating at least \$ \_\_\_ per client
- Establish \_\_\_ COI relationships
- Increase quality and quantity of client referrals
- Build a digital audience
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**AUDIENCE**  
Who is your target audience?  
As you look at the goals of your marketing plan, determine who your target audience is. You may have more than one target audience.

Who is your target audience?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**BUDGET**  
How much are you willing to invest in marketing?  
Time: \_\_\_\_\_

**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 based on the needs you identified on page 2.

**PERSONAL MARKETING**  
BUILD REFERRAL RELATIONSHIPS WITH COIS

Client Referrals     COI Relationships     Speaking     Passion Prospecting

WILL THIS STRATEGY BE PART OF YOUR MARKETING PLAN?  Yes  No

WHAT DO YOU NEED TO CONSIDER?

- 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

WHAT PRE-MARKETING ACTIONS DO YOU NEED TO TAKE?

- Gather names of all current client COIs, by type (CPA, Attorney, etc.)
- Build a COI dream team list
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# Define your TARGET CLIENT

Who is your target audience?

Where would you or how could you find 100 of them (clubs, associations, organic search, acquisition, networkings, COIs, etc.)?


RETIREEES

Within 5 years of retirement

SMALL BUSINESS OWNERS

Solopreneurs

EXECUTIVE FAMILIES

Female C-suites in tech



# WHAT'S OLD

## TRADITIONAL

NETWORKING

SPEAKING

MEETINGS

PRINT PUBLICATIONS

DIRECT MAIL

COLD CALLS

PRINT ADVERTISING

ASSOCIATIONS / TRADE SHOWS



# IS NEW AGAIN

## MODERN

SOCIAL MEDIA

WEBINAR

PHONE / VIDEO

BLOGS / ONLINE PUBLICATIONS

EMAIL

SEARCH

ONLINE ADVERTISING

GROUPS / ONLINE CONFERENCES

# CHOOSE YOUR CHANNEL

"All strategies work,  
you just can't work all  
strategies." ~Stephanie Bogan



# Starting from Ground Zero



## ESTABLISH YOUR TARGET CLIENT

- Retirees in my area; with major local employer(s)
- Want secure retirement, family focus, time to live



## WEBSITE

- Update, retirees ready to follow what sparks joy
- Clear space speaking to employer sub-specialty



## CONTENT MARKETING

- Social media campaigns (retirees/employer)
- Monthly Retirement Ready newsletter
- Podcast: retirees (employer plan special editions)



## PASSION PROSPECTING

- Flying, Community, Company events



## CENTERS OF INFLUENCE

- Local CPAs/Tax preparers
- Local Estate Attorneys
- Major Employer HR managers



## WORKSHOPS & WEBINARS

- 2x year: 5 retirement mistakes not to make with your "employer name" retirement plan



# REACH VS. IMPACT



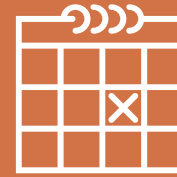
JUST DO  
YOU



# simple secrets to Successful Marketing

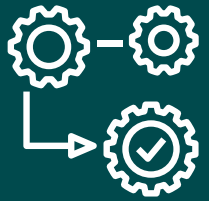


1



- Make a time commitment
- Add to weekly schedule
- Add to annual calendar

2



- Build your M.A.P
- Add to Success Shifter
- Review results weekly
- Automate marketing systems

3



- Create Content Calendar
- Develop content
- Update Prospect Process

4



- Make it a job
- Use Success Shifter or Tasking
- Show Up Consistently!

# YOUR MARKETING M.A.P.



## Marketing Action Playbook

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Establish \_\_\_ COI relationships

Increase quality and quantity of client referrals

Build a digital audience

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How will you measure your success?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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Who is your target audience?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Where would you or how could you find 100 of them (clubs, associations, organic search, acquisition, networkings, COIs, etc.)?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**BUDGET**  
How much are you willing to invest in marketing over the next 12 months?

Time: \_\_\_\_\_ Money: \_\_\_\_\_

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## Marketing Action Playbook

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# CREATE

## your 1-Page Marketing Plan

HOW WILL I REACH THE PEOPLE?

 LIMITLES

### 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 to

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

SPRING SURGES

# CREATING AN ANNUAL CONTENT CALENDAR

Best Practice Guide and Resources

## Marketing Action Playbook

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**TA**  
What is your target audience?  
If you have more than one target audience, determine who you need to focus on.



## 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 /



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							



## LEARN MORE

- 10X is Easier than 2X, Dan Sullivan
- The 1-Page Marketing Plan, Allan Dib
- Fascinate: How to Make Your Brand Impossible to Resist, Sally Hogshead
- Blend Out: From Ordinary to Irresistible, Robert Sofia
- Marketing Rebellion: The Most Human Company Wins, Mark Schaefer
- Permission Marketing, Seth Godin



## ADAPT & APPLY

- Build your One-Page Marketing Plan
- Complete your Marketing Action Playbook
- Read the Annual Content Calendar Guidebook and set up your own content calendar



## TAKE ACTION

- Create a system for managing your marketing plan
- Schedule the annual marketing calendar and block time in your personal calendar
- Commit and consistently implement your marketing plan



LIMITLESS Q&A