

# Mapping Your MARKETING PLAN



# GROWTH ENGINE

(DEFINED)

A steady pipeline of high-quality clients with a 70% conversion rate that meets your growth goals.



GROWTH ENGINE



Marketing Mindset



Differentiator



Ideal Client Avatar



Marketing Action Plan

YOU  
ARE HERE



Choose Your Channels



Marketing Funnel



Content Marketing



Websites that Work



Proven Prospect Process



# Hello My Name Is...



*Flashy*

Shows up once, expects results



*Cheapy*

Thinks marketing is an expense



*Busy*

Lacks time to invest in marketing



*Bouncy*

Shows up, gets busy, stops, repeats like a Yo-Yo



*Grabby*

Grabs at everything, can't say no



*Greedy*

Focused on self, and it's obvious



*Doubty*

Doubtful and uncertain, procrastinates

Flashy

Cheapy

Busy

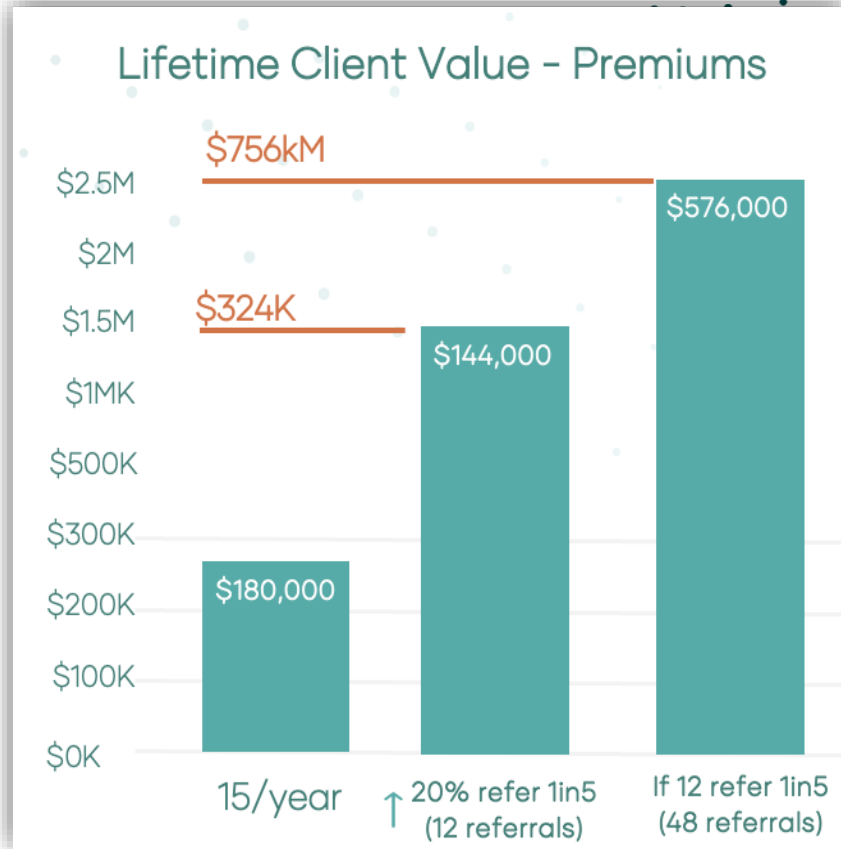
Bouncy

Grabby

Greedy

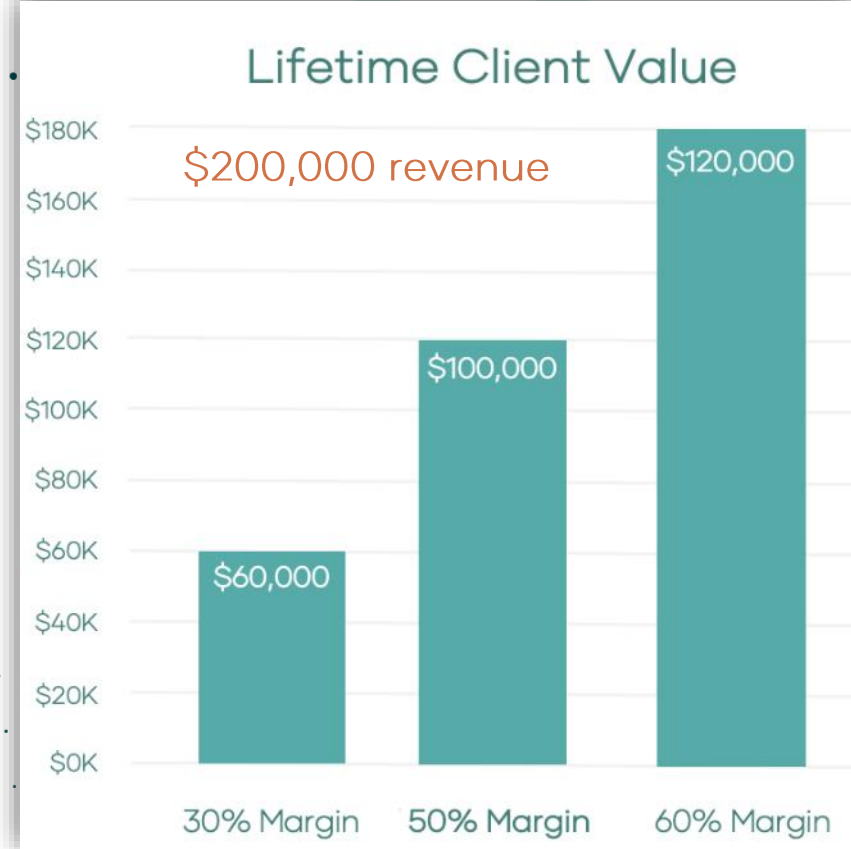
Doubty

# MARKETING MATH



Average premium: \$3MM  
Average sale: \$200,000  
Average commission: \$12,000  
10% of clients make 1 referral every 5 years  
Those 12 referrals refer 1 in 5 years (20 years)

Lifetime client revenue:  
\$324k-\$756k in premiums



\$10,000/year in AUM fees  
Client retention rate: 95%  
Average client tenure: 20 years

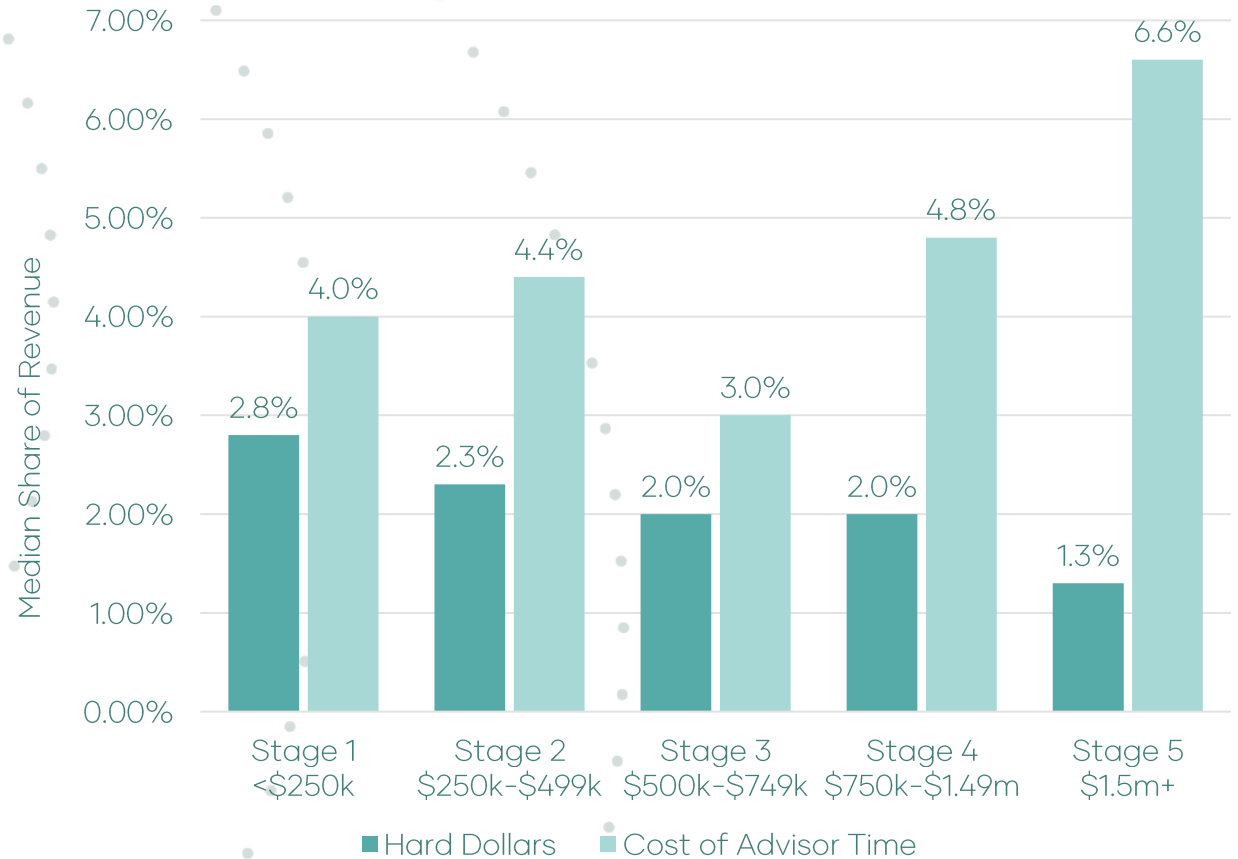
Lifetime client revenue:  
 $20 \times \$10,000 = \$200,000$   
(not including referrals)

# MARKETING MATH

- The average advisory firm spends **1-3%** of revenue on marketing
- Average advisory firms spends **10%** of time on marketing
- Average firm has **3%** growth rate
- Organic growth rates dropped from **9% to 3%** over last 10 years

## ADVISOR MARKETING SPEND

Hard Dollars & Advisor Time by Practice Size



# A SIMPLE FORMULA FOR SUCCESS



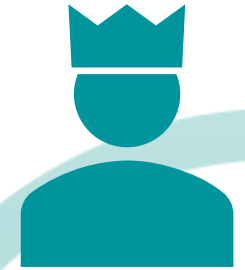
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RIGHT  
MESSAGE

RIGHT  
PEOPLE

RIGHT  
PLACE

IDEAL  
CLIENTS

Deliver a Sticky  
Message

Relevant to Your  
Target Client

Meet Them  
Where They Are

Make a Clear &  
Compelling Offer

# The Average Advisor's Plan

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# Limitless Advisor Marketing Plan



# BUILDING YOUR M.A.P.

## MARKETING ACTION PLAYBOOK



# Define your TARGET CLIENT

RETIREEES  
within 5 years of  
retirement

SMALL-BUSINESS  
OWNERS  
Solopreneurs

EXECUTIVE  
FAMILIES  
Female C-suites  
in tech

## AUDIENCE

Who is your target audience? Define it and brainstorm reach strategies by listing out all the places your audience may engage: profession, organizations, clubs, SEO, COIs, networking, etc.



# Two Requirements:

1. Clear Client Avatar
2. Compelling CTAs



## Demographics

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Pain Points

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## Demographics

Age 50+

\$1MM+ Investable Assets

Low Expenses, Zero Debt

## Pain Points

Tsunami of RMD's

Surviving Spouse  
Lacks Expertise

Not Where Want Spend Time

Worried about Making Mistakes

# Client Avatar

## Demographics

- Profession (e.g., Optometrist, SLP, Dentist)
- Employer (e.g., Intel, Amazon, Qualcomm)
- Employment Position (e.g., Senior Developer, C-Suite)
- Compensation Type (e.g., W2, RSU's, Contractor)
- Marital/Dependent Status
- Age or generation (e.g., Millennials, Gen X/Y)
- Income
- Tax Bill (e.g., paying \$300,000+ in taxes per year)
- Savings rate or amount (e.g., saving 70% of income, maxing out retirement accounts)
- Business owner (gross revenue, # of employees, Pre IPO)
- Geographic Location

## Pain Points

- "Don't know what we don't know"
- Make work optional
- Organize and simplify finances
- Mitigating taxes while working
- Navigating/maximizing/understanding complex comp
- \$\$\$ stuck in business (how to sell a fund retirement)
- Career stagnant
- Starting a business
- Student loan debt
- Cash flow challenges
- Liquidity event, inheritance, death, divorce

# CHOOSE YOUR CHANNEL



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

A woman with long, wavy brown hair is wearing a bright yellow hoodie. She is holding a black microphone in her right hand and has her left hand held out palm up. She has a surprised or excited expression on her face, looking towards the right. The background is a solid teal color with faint, concentric circular patterns on the left side. The text 'JUST DO YOU' is written in white, uppercase, sans-serif font to the right of the woman.

JUST DO  
YOU

# BUILD YOUR M.A.P.

## MARKETING ACTION PLAYBOOK

## MARKETING ACTION PLAYBOOK

What's inside?

- Set your revenue targets and identify key performance indicators to measure your marketing effectiveness.
- Learn how to effectively define and understand your target market to tailor your messaging to the outreach.
- Discover 11 months ways to connect with your audience, including digital ad creative, events, and content marketing.

**STEP 1** Define your goals, audience & budget

**GOALS**  
What is the goal of your marketing strategy?

**NEW REVENUE**  
 New revenue: \_\_\_\_\_  
 New clients: \_\_\_\_\_  
 Avg. new client revenue: \_\_\_\_\_  
 New AUM: \_\_\_\_\_  
 Client referrals/year: \_\_\_\_\_  
 COI referrals/year: \_\_\_\_\_

**HOW MANY AUM**  
 How many AUM respecting priority: \_\_\_\_\_  
 How many AUM respecting secondary: \_\_\_\_\_  
 How many AUM respecting tertiary: \_\_\_\_\_

**AUDIENCE**  
 Who is your target audience? Define it and break it down, such as age, sex, location, etc. or the way to access your audience may be gender, profession, organization, etc. Also, EEO/ADA in advertising, etc.

## GETTING FAMILIAR: THE MARKETING WHEEL

The marketing wheel is a handy way to break down your marketing efforts into three key areas:

- DIGITAL MARKETING** - All content, using both paid and organic, is created and shared on these digital platforms. From the blog to your website, your content is being covered by the voice search, video, and using software tools to boost your ability to connect with more people online.
- OUTREACH** - Whether you're looking to build relationships with new clients or looking for ways to reach your existing clients, this can be done by reaching out directly to your target audience. This can be done through direct mail, targeted email, or in-person events. Outreach is a key component of your marketing strategy and can help you build relationships with new clients and keep existing clients engaged and loyal.
- PERSONAL MARKETING** - This involves reaching out to your existing clients through direct mail, targeted email, or in-person events. Outreach is a key component of your marketing strategy and can help you build relationships with new clients and keep existing clients engaged and loyal.

**CHOOSE YOUR MARKETING CHANNELS**

## BUDGET

Define the resources you will invest when setting your marketing plan to meet its goals.

Hours/Week: \_\_\_\_\_ Budget: \_\_\_\_\_  
 Days/Month: \_\_\_\_\_ People/Budget: \_\_\_\_\_

### CALCULATIONS: PLANNING FOR GROWTH

That is the difference between your current revenue and your target revenue.

REVENUE GAP = TARGET REVENUE - CURRENT REVENUE

**DETERMINE AVERAGE CLIENT SIZE**  
 This is the average revenue generated per client.

AVERAGE CLIENT SIZE = CURRENT REVENUE / TOTAL CLIENTS

**CALCULATE NEW CLIENT SIZE NEEDED**  
 To generate your revenue gap, you need to determine how many new clients you need to acquire.

NEW CLIENTS NEEDED = REVENUE GAP / AVERAGE CLIENT SIZE

**Example Calculation:**  
 Target Revenue: \$500,000  
 Current Revenue: \$300,000  
 Revenue Gap: \$500,000 - \$300,000 = \$200,000  
 Total Clients: 2000  
 Current Clients: 1500  
 Average Client Size: \$133,333  
 New Clients Needed: \$200,000 / \$133,333 = 1.5 new clients

## MARKETING ACTION PLAYBOOK

**STEP 2** Select your marketing strategies & activities

Now, marketing professionals can be broken down into three broad areas of the marketing wheel: **digital marketing**, **outreach**, and **personal marketing**. A mix of these three areas, plus relevant strategy, can be your strategy.

**DIGITAL MARKETING QUESTIONS TO CONSIDER**

**Website:**

- Do you have a website? Can it be improved?
- Is it mobile-friendly? Is it user-friendly and SEO-optimized?

**Video:**

- Do you have a video strategy? Can you create content for your website, social media, and other channels?
- Do you have a video strategy? Can you create content for your website, social media, and other channels?

**Audio:**

- Do you have a podcast or audio content strategy? Can you create content for your website, social media, and other channels?
- Do you have a podcast or audio content strategy? Can you create content for your website, social media, and other channels?

**Social Media:**

- Do you have a social media strategy? Can you create content for your website, social media, and other channels?
- Do you have a social media strategy? Can you create content for your website, social media, and other channels?

## DIGITAL MARKETING ACTIVITIES

**Website**

- Do you have a website? Can it be improved?
- Is it mobile-friendly? Is it user-friendly and SEO-optimized?

**Video**

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- Do you have a social media strategy? Can you create content for your website, social media, and other channels?
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## MARKETING ACTION PLAYBOOK

**STEP 3** Build your marketing calendar

Now, marketing professionals can be broken down into three broad areas of the marketing wheel: **digital marketing**, **outreach**, and **personal marketing**. A mix of these three areas, plus relevant strategy, can be your strategy.

Month	Marketing Strategy	Activity
Jan		
Feb		
Mar		
Apr		
May		
Jun		
Jul		
Aug		
Sep		
Oct		
Nov		
Dec		

## 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 reflect your plan.

WEEK	PLAN & PREP	CONTENT	COIs	NETWORKING	CLIENTS
1	Annual scheduling	Email Newsletter	COI meet w/(set)	Networking	CLIENTS
2	Q1 content drafting	Article	Contact 3 new	Golf, weekly	
3	Q1 content drafting	Article	COI meet w/(set)	Board meeting	
4	Web firm decision	Podcast	Contact 3 new	Coffee Chat	
5	Web update	Podcast	COI meet w/(set)	Coffee Chat	
6	Web update	Email Newsletter	Contact 3 new	Coffee Chat	
7	Web update	Article	COI meet w/(set)	Coffee Chat	Shredding Pa
8	Record Q2 podcasts	Podcast	Contact 3 new	Coffee Chat	
9	Prep, Tax Time Treats	Podcast	COI meet w/(set)	Coffee Chat	
10	Launch web update	Email Newsletter	Tax Time Treats	Board meeting	
11		Article	Tax Time Treats	Coffee Chat	
12		Podcast	COI connect	Coffee Chat	
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SPRING SURGE

FALL SURGE

BREAK WEEK

BREAK WEEK

BREAK WEEK

BREAK WEEK

END OF YEAR REVIEW / NEXT YEAR PREP

# SHOW ME YOUR BUDGET

- How **IMPORTANT** is growth to you?
- How much do you **WANT** to grow?
- How much **TIME** will you commit?
- How much **MONEY** will you invest?



**BUDGET**  
Define the resources you will invest when setting your marketing plan in motion.

Hours/week \_\_\_\_\_ Budget \_\_\_\_\_  
Days/month \_\_\_\_\_ People budget \_\_\_\_\_

**CALCULATIONS: PLANNING FOR GROWTH**  
To effectively plan for growth, it's essential to understand the financial metrics that will guide your marketing strategy. Here's how to calculate your revenue gap and determine the number of new clients needed to meet your goals.

**CALCULATE YOUR REVENUE GAP**  
This is the difference between your current revenue and your target revenue.

REVENUE GAP = TARGET REVENUE - CURRENT REVENUE

\_\_\_\_\_

**DETERMINE AVERAGE CLIENT SIZE**  
This is the average revenue generated per client.

AVERAGE CLIENT SIZE = CURRENT REVENUE / TOTAL CLIENTS

\_\_\_\_\_

**CALCULATE NEW CLIENT SIZE NEEDED**  
To achieve your revenue goals, you need to determine how many new clients you need to acquire.

NEW CLIENTS NEEDED = REVENUE GAP / AVERAGE CLIENT SIZE

\_\_\_\_\_

*Example Calculation*

Target Revenue: \$500,000	Total Clients: 100 clients
Current Revenue: \$300,000	Average Client Size: \$300,000 / 100 = \$3,000
Revenue Gap: \$500,000 - \$300,000 = \$200,000	New Clients Needed: \$200,000 / \$3,000 = 67 new clients

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# SET YOUR GOALS



DEFINE S.M.A.R.T. GOALS THAT ALIGN WITH YOUR VISION



BRING IN 10 CLIENTS YEAR AT \$10,000 AVG EACH



BUILD 5 COI RELATIONSHIPS THAT REFER 3X PER YEAR



TRIPLE THE NUMBER OF CLIENT REFERRALS



GENERATE 1 NEW LEAD QUARTER FROM DIGITAL STRATEGY



## MARKETING ACTION PLAYBOOK

**What's inside?**

- Set clear revenue targets and identify key performance indicators to measure your marketing effectiveness
- Learn how to accurately define and understand your target market to tailor your messaging and outreach
- Discover innovative ways to connect with your audience, including digital platforms, events, and content marketing

### STEP 1 Define your goals, audience & budget

**GOALS**  
What is the goal of your marketing strategy?

Select the following strategies to measure your success:

<input type="checkbox"/> New revenue	<input type="checkbox"/> New revenue/AUM reporting (monthly)
<input type="checkbox"/> New clients	<input type="checkbox"/> Pipeline reporting (monthly)
<input type="checkbox"/> Avg. new client revenue	<input type="checkbox"/> Practice benchmarking (quarterly)
<input type="checkbox"/> New AUM	<input type="checkbox"/> Marketing meetings (weekly or monthly)
<input type="checkbox"/> Client referrals/year	<input type="checkbox"/> Business reviews (quarterly)
<input type="checkbox"/> COI referrals/year	<input type="checkbox"/> Target client

**AUDIENCE**  
places your audience may engage: profession, organizations, clubs, SEO, COIs, networking, etc.

### BUDGET

Define the resources you will invest when setting your marketing plan in motion.

Hours/week \_\_\_\_\_ Budget \_\_\_\_\_  
Days/month \_\_\_\_\_ People budget \_\_\_\_\_

#### CALCULATIONS: PLANNING FOR GROWTH

To effectively plan for growth, it's essential to understand the financial metrics that will guide your marketing strategy. Here's how to calculate your revenue gap and determine the number of new clients needed to meet your goals.

##### CALCULATE YOUR REVENUE GAP

This is the difference between your current revenue and your target revenue.

$$\text{REVENUE GAP} = \text{TARGET REVENUE} - \text{CURRENT REVENUE}$$


---

##### DETERMINE AVERAGE CLIENT SIZE

This is the average revenue generated per client.

$$\text{AVERAGE CLIENT SIZE} = \text{CURRENT REVENUE} / \text{TOTAL CLIENTS}$$


---

##### CALCULATE NEW CLIENT SIZE NEEDED

To achieve your revenue goals, you need to determine how many new clients you need to acquire.

$$\text{NEW CLIENTS NEEDED} = \text{REVENUE GAP} / \text{AVERAGE CLIENT SIZE}$$


---

**Example Calculation**

Target Revenue: \$500,000	Total Clients: 100 clients
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# 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

# MARKETING ACTION PLAYBOOK

## STEP 2 Select your marketing strategies & activities

Your marketing activities can be summarized to include three areas of the marketing wheel: **digital marketing**, **outreach** and **personal marketing**. In each of these three areas, you have a variety of activities you can pursue.

1

### DIGITAL MARKETING QUESTIONS TO CONSIDER

#### Website

- What updates or optimizations can you make to your website?
- How will you ensure it is user-friendly and SEO-optimized?

#### Video

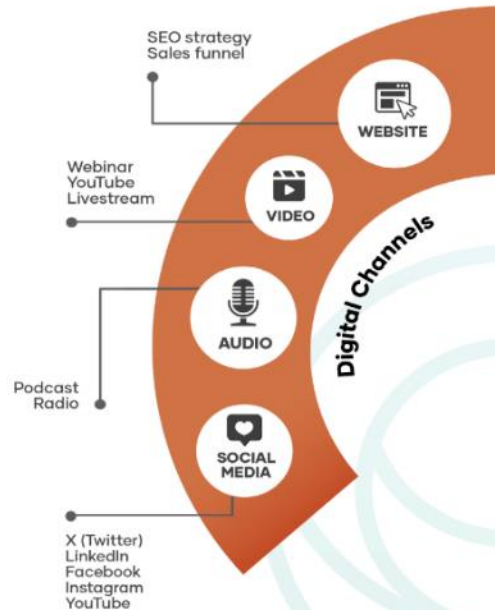
- What types of video content can you create (ex: tutorials, testimonials)?
- How will you distribute this content (ex: YouTube, social media)?

#### Audio

- Will you create a podcast or audio content? If so, what topics will you cover?
- How will you promote your audio content?

#### Social Media

- Which platforms will you focus on (ex: Facebook, Instagram, LinkedIn)?
- What type of content will you share to engage your audience?



# CHOOSE YOUR CHANNELS



### DIGITAL MARKETING ACTIVITIES

#### Website

- Find 5-10 relevant keywords to use on your website
- Open your website on a mobile device to ensure it looks good and functions well
- Place a clear CTA button on your homepage (ex: "Sign up now")
- Create a google analytics account and add the tracking code to your website
- Set up/update your google business listing
- Replace one piece of text on your site with a relevant image or infographic.
- Review and refresh one outdated page or blog post on your site
- 

#### Audio

- Start a podcast by picking a topic and recording your first episode with a smartphone or computer
- Create a "one-minute insight" series with short, engaging audio clips
- Record an intro message about yourself and your business for your website or social media
- Host a basic audio Q&A by recording answers to common questions and sharing them online
- Share audio recommendations with brief segments on useful books, tools, or resources.
- Produce a "tip of the day" with daily or weekly audio tips for your audience
- 

#### Video

- Create video testimonials by having clients share their experiences, then post them
- Film a behind-the-scenes video to show your day-to-day work or event prep
- Host a live Q&A on Instagram or YouTube to answer audience questions in real-time
- Record a tutorial showing how to use your product or service with easy steps
- Do a "Meet the Team" video to introduce your team in short, fun clips
- Create a video series on one topic
- Share a success story by recording a video case study on how you helped a client
- 

#### Social Media

- Choose 1-2 platforms that best fit your target audience, like Instagram or LinkedIn
- Create or update profiles with consistent branding, including your logo and bio
- Write down 5 ideas that align with your brand and audience interests
- Create a monthly content calendar and schedule at least 2 posts per week on each platform
- Design graphics using a tool like Canva
- Post regularly by scheduling at least one post per week on each chosen platform
- Engage with followers by responding to comments and messages
- Join 1-2 industry-related groups on Facebook or LinkedIn
-

# SAMPLE PLAYBOOK



## ESTABLISH YOUR TARGET CLIENT

- Retirees in my area who worked with major local employer(s)
- Those who want secure retirement, family focus, time to live



## WEBSITE

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



## CONTENT MARKETING

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



## PASSION PROSPECTING

- Flying, Community, Company events



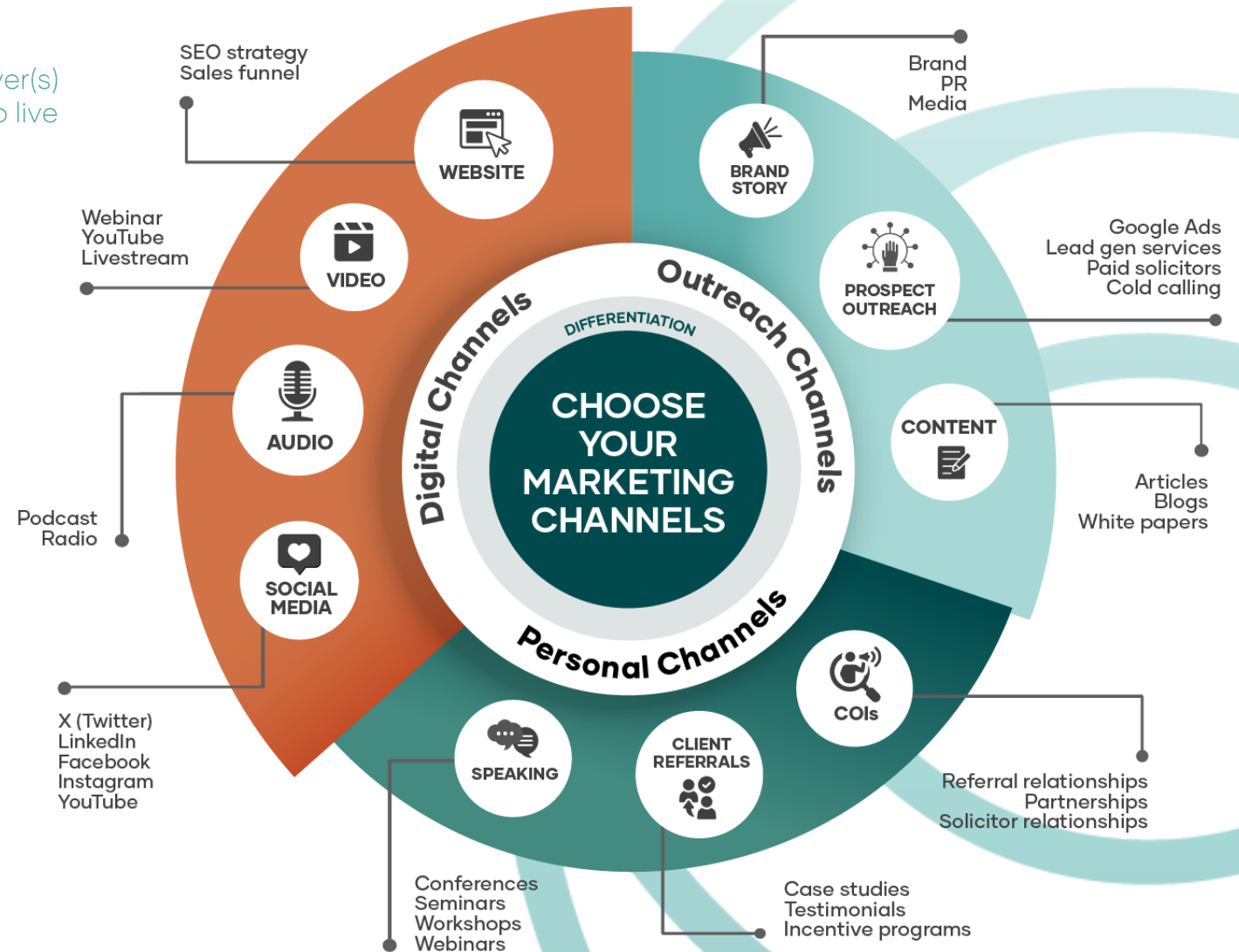
## CENTERS OF INFLUENCE

- 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



# KEEP IT SIMPLE TO START

	Q1	Q2	Q3	Q4
Inbound Marketing	Set up website and blog	Write 2x/month on "retiring into your practice"	Find 1 guest blogger expert per month	
Referral Networking	Join AIA	Attend Chapter Meetings	Find AIA Volunteer committee to join	
Establishing Credibility		Create presentation on "Retiring into your practice"	Deliver presentation to local chapter	Deliver presentation to 2 other AIA chapters
Building Awareness			Pitch article about "Retiring into your practice" to 2 trade publications	Pitch presentation for next year's national conference
Thought Leadership			Formulate Survey on semi-retired architects	Find media partner to distribute survey with plans to publish in Q1 next year

# CREATE

# your 1-Page Marketing Plan

HOW WILL I REACH THE PEOPLE?

### MARKETING ACTION PLAYBOOK

**STEP 3** Build your marketing calendar

Insert the marketing strategies and activities that you selected in Step 2 and place them in your 12-month marketing calendar.

WEEKS	MARKETING STRATEGIES		
	Digital	Outreach	Personal
Week 1			
Week 2			
Week 3			
Week 4			
Week 5			
Week 6			
Week 7			
Week 8			
Week 9			
Week 10			
Week 11			
Week 12			
Week 13			
Week 14			
Week 15			
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Week 21			
Week 22			
Week 23			

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6	Web update		Contact 3 new	Coffee Chat	
7	Web update	Email Newsletter	COI meet w/(set)		
8	Web update		Contact 3 new	Coffee Chat	
9	Web update	Article	COI meet w/(set)	Coffee Chat	Shredding Par
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17		Podcast	COI connect		
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19		Email Newsletter		Coffee Chat	
20	Record Q3 podcasts				
21		Article			
22					
23		Podcast			
24				Board meeting	
25		Email Newsletter	COI connect		
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27		Article	COI connect	Coffee Chat	
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IF YOU WORK  
THE PLAN,



THE PLAN  
WILL WORK

# simple secrets to Successful Marketing



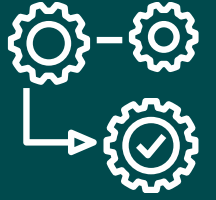
LIMITLESS

1



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

2



- Build your M.A.P.
- Plan & set actions (w/team)
- Put tracking in place

3



- Create Content Calendar
- Develop content
- Update Prospect Process

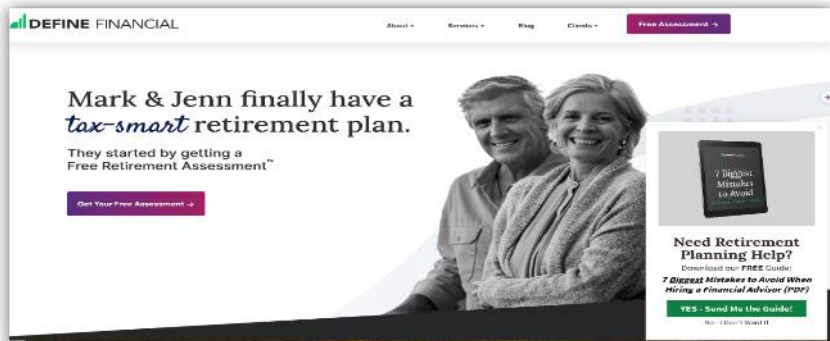
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- Make it a job
- Put it on your schedule
- Show up consistently

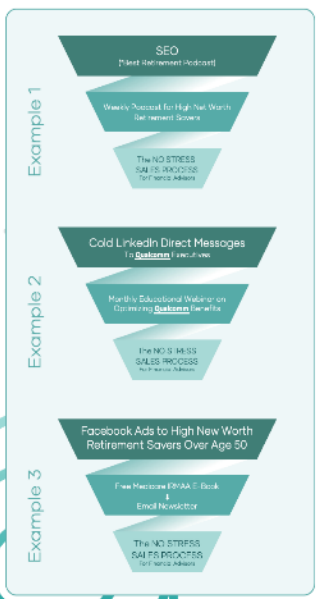
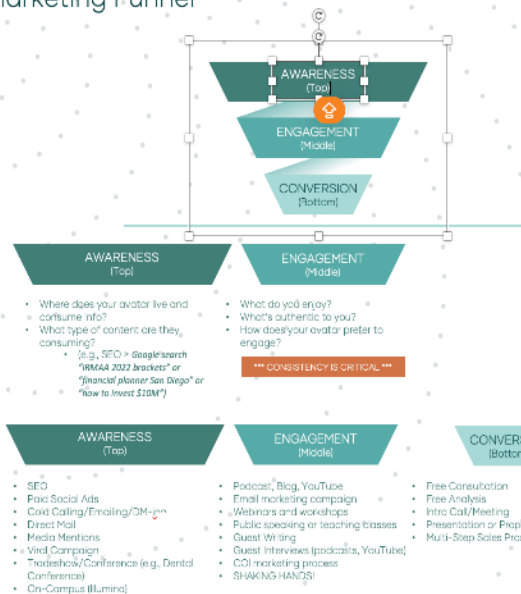


## Websites that Work



- ✓ HERO HEADLINE STRONG
- ✓ TARGET MARKET CLEAR
- ✓ VALUE PROPOSITION
- ✓ MAKES OFFER(S)
- ✓ SAFE NEXT STEP

## Marketing Funnel



# SUPPORTING LESSONS





## 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

- Complete your Marketing Action Playbook
- Build your 1-Page Marketing Plan
- 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