

LIMITLESS

# MARKETING ACTION PLAYBOOK



# 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:

New revenue .....  
New clients .....  
Avg. new client revenue .....  
New AUM .....  
Client referrals/year .....  
COI referrals/year .....

<input type="checkbox"/>	New revenue/AUM reporting (monthly)
<input type="checkbox"/>	Pipeline reporting (monthly)
<input type="checkbox"/>	Practice benchmarking (quarterly)
<input type="checkbox"/>	Marketing meetings (weekly or monthly)
<input type="checkbox"/>	Business reviews (quarterly)
<input type="checkbox"/>	Target client

### 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.

## 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

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### DETERMINE AVERAGE CLIENT SIZE

This is the average revenue generated per client.

AVERAGE CLIENT SIZE = CURRENT REVENUE / TOTAL CLIENTS

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### 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

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#### Example Calculation

Target Revenue: \$500,000  
Current Revenue: \$300,000  
Revenue Gap: \$500,000 - \$300,000 = \$200,000

Total Clients: 100 clients  
Average Client Size: \$300,000 / 100 = \$3,000  
New Clients Needed: \$200,000 / \$3,000  
≈ **67 new clients**

# GETTING FAMILIAR: THE MARKETING WHEEL

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

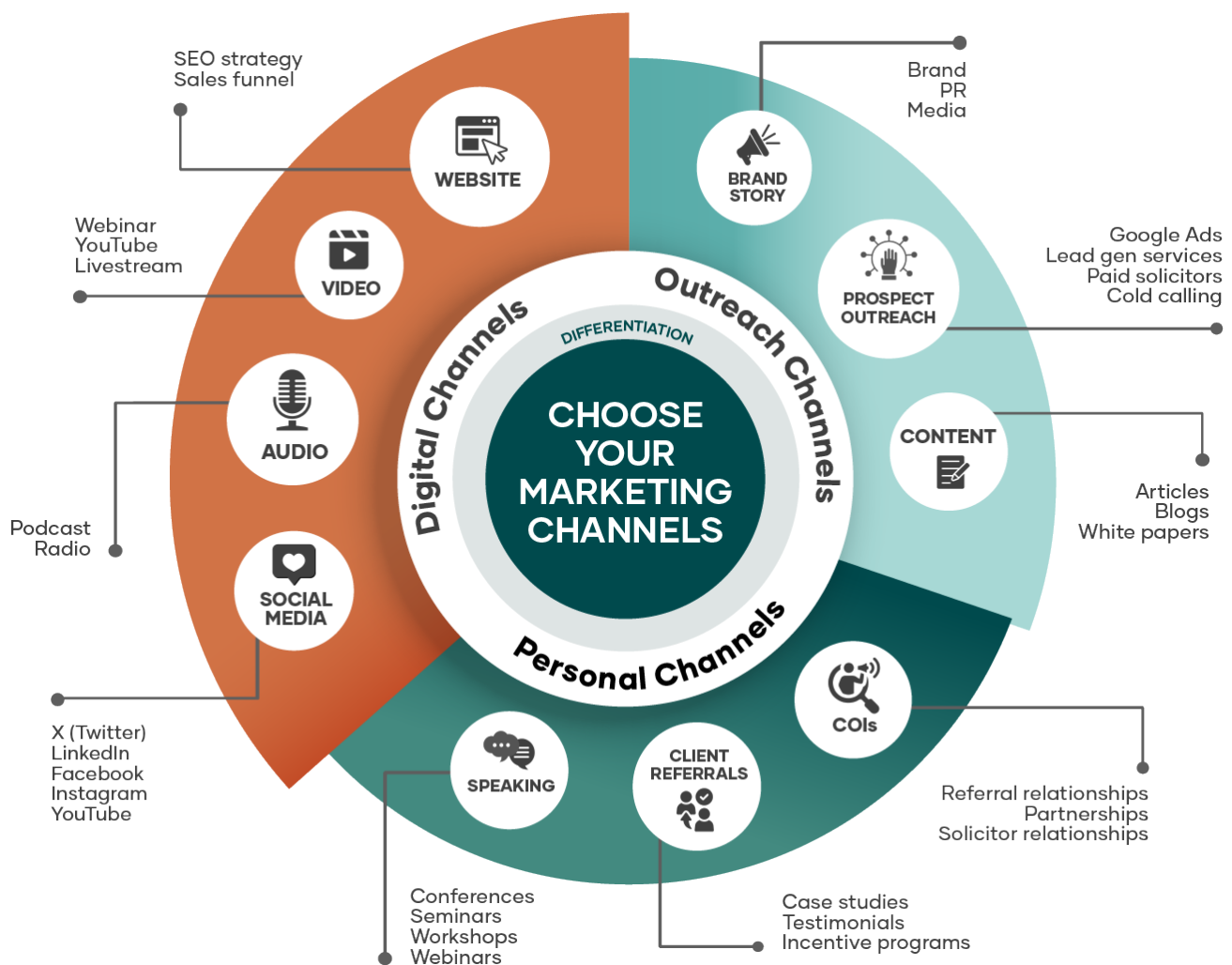
## DIGITAL MARKETING

is all about using online tools to get your brand out there. This includes things like making your website user-friendly, creating fun videos, starting a podcast, and being active on social media. The goal here is to boost your visibility and connect with more people online.

**OUTREACH** is where you get proactive. It's about reaching out to potential clients and spreading the word about your brand. This can involve telling your brand story in a way that resonates, sending targeted emails to prospects, and creating valuable content that showcases your expertise. By sharing insights and helpful resources, you position yourself as an authority in your field, which helps attract and keep clients.

## PERSONAL MARKETING

is focused on building relationships. This includes speaking at events, encouraging your happy clients to refer others, and teaming up with key influencers in your industry. It's all about making those personal connections and building trust, which is super important for keeping clients engaged and loyal.



# 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.

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### 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

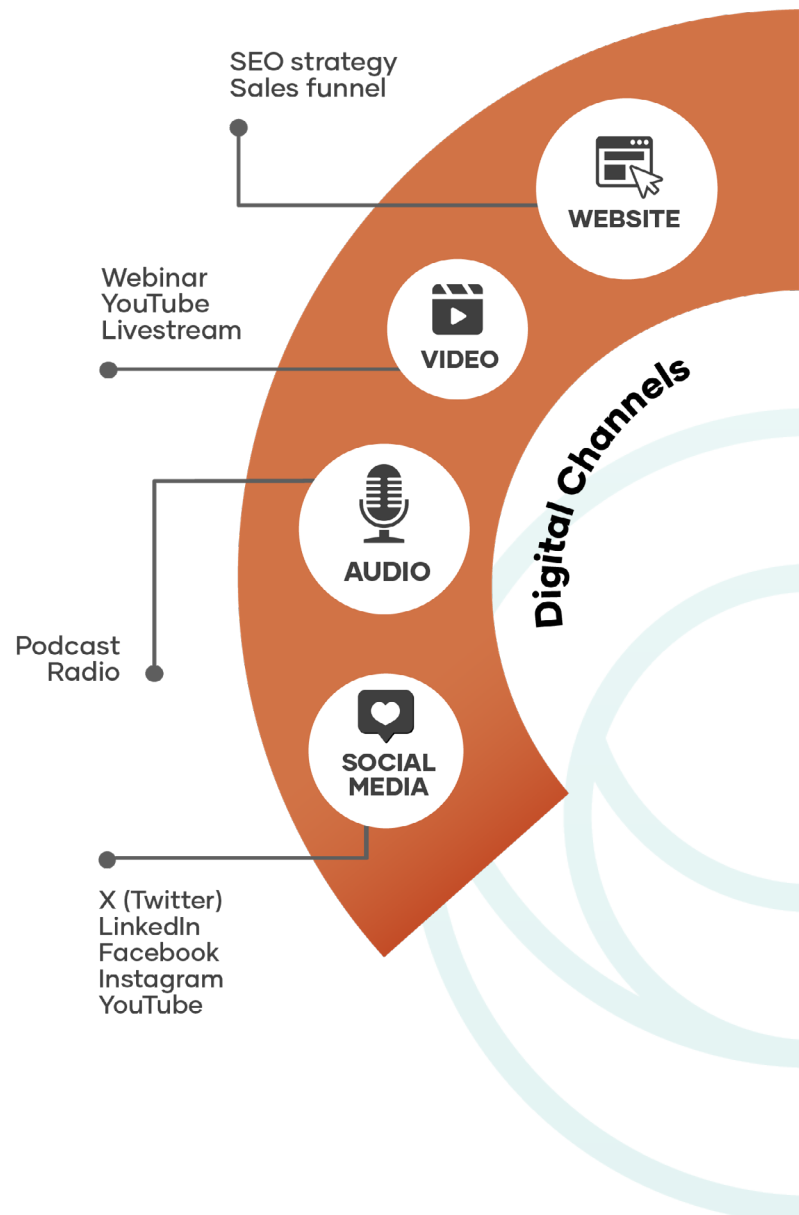
- What types of video content can you create (ex: tutorials, testimonials)?
- How will you distribute this content (ex: YouTube, social media)?

#### 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?



# 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
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## 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
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## 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
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## Social Media

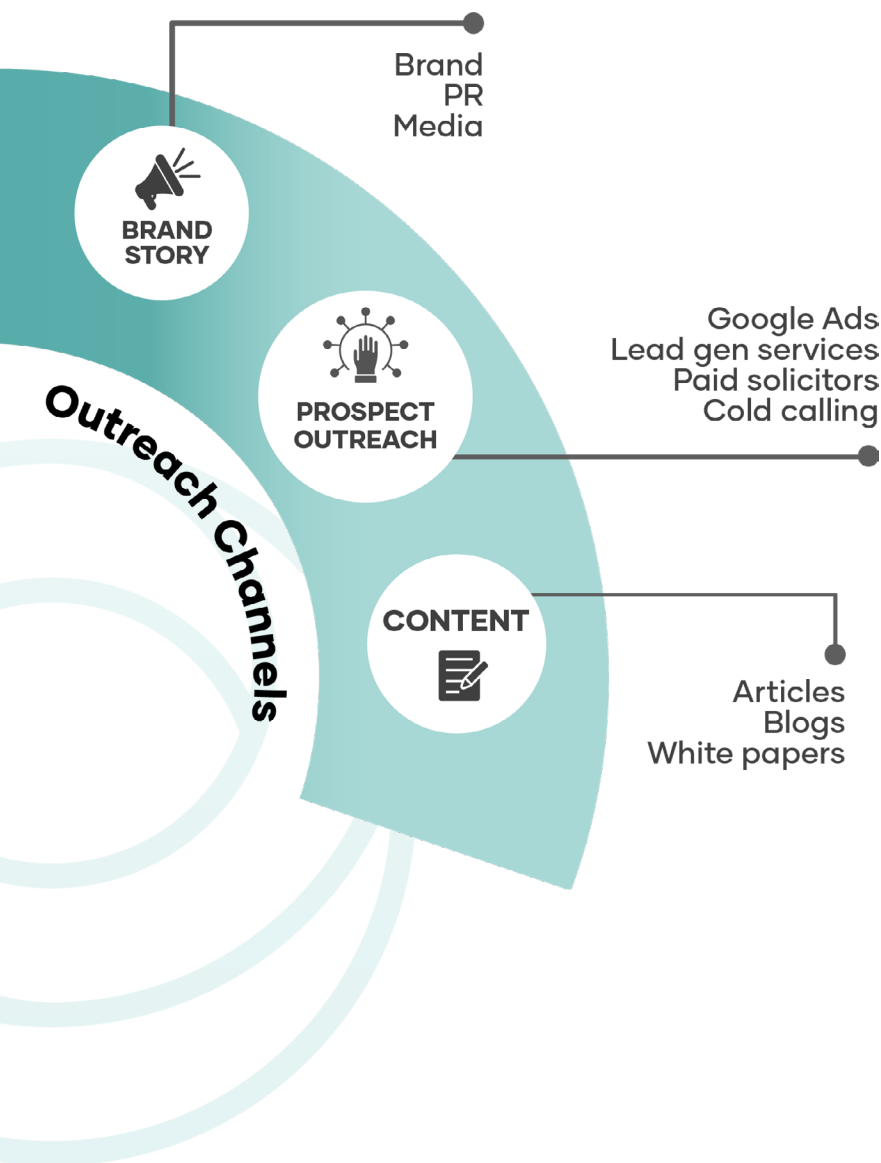
- Choose 1-2 platforms that best fit your target audience, like Instagram or LinkedIn
- Create or update profiles with consistent branding, including your logo and bio
- Write down 5 ideas that align with your brand and audience interests
- Create a monthly content calendar and schedule at least 2 posts 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
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# MARKETING ACTION PLAYBOOK

## STEP 2 (CONTINUED)

## 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.



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## OUTREACH

### QUESTIONS TO CONSIDER

#### Brand Story

- What is your brand's unique story? How can you communicate it effectively?
- Is your brand up-to-date and does it speak clearly to your target market?

#### Content

- What types of content will you create to attract and inform your audience (ex: blogs, white papers)?
- How will you distribute this content to maximize reach?

#### Prospect Outreach

- What methods will you use to reach out to potential clients?
- What key messages will you include in your outreach efforts?

# OUTREACH ACTIVITIES

## Brand Story

- In one sentence, write out your #1 reason for being a financial advisor
- Craft your brand narrative highlighting your mission, values, and uniqueness
- Create a basic press kit with your bio, services, logo, and qualifications for media or clients
- Use social media for financial tips to educate your audience on budgeting, investing, and retirement.
- Collect client testimonials and share success stories on your website and social
- Host a free webinar on financial basics to introduce your services and build trust.
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## Content

- Start a blog with posts on budgeting, investing, or retirement tips
- Write a simple white paper on key financial topics and share with clients
- Post articles on LinkedIn or your website that explain financial concepts clearly
- Share case studies showing how your advice helped clients reach goals
- Offer a free "how-to" PDF guide on financial planning to attract leads
- Set up regular nurture email campaigns to mailing list or develop targeted campaigns based on client interests
- Send a monthly newsletter (not cheesy) with financial tips and your latest content
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## Prospect Outreach

- Set up Google Ads targeting keywords like "financial planner near me" or "retirement advisor" to attract prospects to your website
- Use lead generation services like SmartAsset or WizeFi to match with qualified leads
- Hire a paid solicitor to handle outreach and schedule meetings with potential clients
- Cold call with a clear, value-driven message to introduce your services and set appointments
- Run Facebook or Instagram Ads to target specific demographics, such as age, income level, and location, with offers like a free consultation
- Send personalized emails to prospects offering value, such as a free e-book or webinar invite, to encourage engagement
- Join financial advisory directories like FeeOnlyNetwork or NAPFA so prospect scan find you online
- Offer a free consultation to prospects via your website or social media, providing them with valuable advice and encouraging them to become clients.
- Use LinkedIn for prospecting by connecting with potential clients or referral partners and sharing helpful financial tips.
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# MARKETING ACTION PLAYBOOK

## STEP 2 (CONTINUED)

### 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.

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### PERSONAL MARKETING

#### QUESTIONS TO CONSIDER

##### Speaking

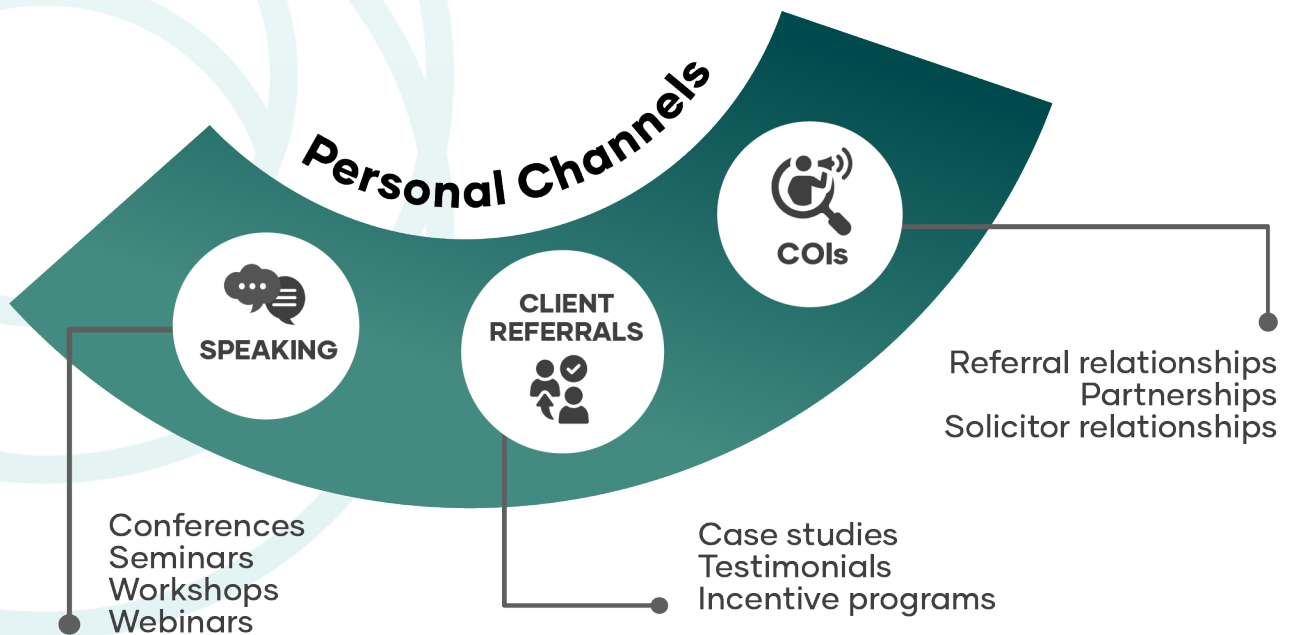
- What speaking opportunities can you pursue (ex: conferences, webinars)?
- What topics will you present that align with your expertise?

##### Client Referrals

- How will you encourage existing clients to refer new clients to you?
- What incentives or programs can you implement to facilitate referrals?

##### Centers of Influence (COIs)

- Who are your key COIs, and how can you strengthen these relationships?
- What collaborative opportunities can you explore with your COIs?



# PERSONAL MARKETING ACTIVITIES

## Speaking

- Speak at conferences to share your expertise with a broader audience
- Lead seminars on relevant topics to showcase your knowledge
- Host workshops for hands-on learning and deeper engagement
- Conduct webinars to reach a wider audience remotely
- Participate in panel discussions to engage with other experts and expand your network
- Offer guest speaking engagements at industry events or local organizations
- Create and present a signature talk on a key topic to build your personal brand
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## Client Referrals

- Implement the 3-Step Referral Roadmap
- Conduct client interviews to gather feedback on how to best serve and improve their experience
- Hold the “how we handle referrals” conversation with all clients to clarify and encourage referrals
- Send regular nurture communications and value-adds to stay top-of-mind
- Host a client appreciation event (ex: BBQ)
- Share client case studies to demonstrate success and attract potential referrals
- Share a success story on social media
- Start a Client Advisory Board to engage top clients and gather referrals
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## COIs

- Implement the 5-Step COI Referral Roadmap
- Practice your pitch so you can easily explain how you can help in meetings or networking
- Set up regular check-ins with your COIs, like monthly emails or calls
- Track COI info with a simple sheet noting their details and how you can connect
- Follow COIs on social media and interact with their posts
- Suggest teaming up for a workshop or webinar on finance topics
- Swap referrals by offering to send clients their way and asking for the same
- Meet solicitors for coffee to chat about how you can support each other
- Host a casual networking event to introduce your COIs to each other
- Write for COIs' blogs or newsletters to showcase your expertise
- Deliver tax season treats to CPAs
- Organize joint meetings with top clients and their COIs (“Client Board Meetings”)
- Proactively send year-end tax info for mutual clients to client COIs
- Teach Continuing Education and host CE events for COIs
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# 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			
Week 16			
Week 17			
Week 18			
Week 19			
Week 20			
Week 21			
Week 22			
Week 23			
Week 24			
Week 25			
Week 26			

WEEKS	MARKETING STRATEGIES		
	Digital	Outreach	Personal
Week 27			
Week 28			
Week 29			
Week 30			
Week 31			
Week 32			
Week 33			
Week 34			
Week 35			
Week 36			
Week 37			
Week 38			
Week 39			
Week 40			
Week 41			
Week 42			
Week 43			
Week 44			
Week 45			
Week 46			
Week 47			
Week 48			
Week 49			
Week 50			
Week 51			
Week 52			