

2016 Multi-touch Marketing Calendar Planning Guide

***My Marketing Goal:**
To Maintain All My
Qualified Clients & Attract
Qualified Prospects*



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Month	Marketing Activity	Person Responsible	Time	Investment
January				
February				
March				
April				
May				
June				

Month	Marketing Activity	Person Responsible	Time	Investment
July				
August				
September				
October				
November				
December				
TOTALS				

Prospect Awareness Program List Procedures

To build the strongest prospect awareness list for your practice, focus on prospects that meet the following criteria:

1. They know who you are;
2. There must be a high probability that they meet your minimum asset requirements.

There are three ways to building a high quality Prospect Awareness List:

1. Anyone who has attended an event and has not yet become a client.
2. People that are referred to you by a client.
3. Individuals met through clubs, organizations, or regular daily events.

In order to promote your practice and stay visible in front of these high quality prospects, the Prospect Awareness mailing should consist of:

1. Informative content;
2. A cover letter explaining who you are and why they are receiving the mailing; and
3. Invitations to client education events.

A few days after every mailing (or at least every other mailing) make a follow up call.

Here is a sample script:

*"I'm calling to see if you received our recent mailing entitled _____.
We'd love to hear if it was helpful."*

Then ask:

*"Most people say that when they meet Tom, it is one of the best things they have ever done.
Would you like to come in to see Tom?"*

Remember to smile and be enthusiastic!

Your goal is to promote your business and stay visible in front of potential new clients. We usually keep our list fresh by removing names after 24 months. We are not sure when the timing or situation occurs that makes the prospect think about changing financial advisors, but we want to make sure that we will be visible when that time comes. **With a Prospect Awareness list of 150-300 qualified leads and one mailing a month, an advisor can expect to schedule at least 5-10 new appointments per year.**

Prospect Awareness Planning Matrix

Goal: 150 – 300 Prospects

Current Participants: _____

Your Target: _____

Month	Mailing	# Mailed To	# to Call	Mail Date	Follow-up Date/Time
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

Sample:

September	Backdoor Roth IRA	220	180	9/9	9/20,21,27,28 2-4pm
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Follow-up is as easy as 1 – 2 – 3 !

1. Mail (articles and invitations).
2. Make follow-up calls.
3. Keep building your list!

6 Things to Help Make 2016 Your Best Year Ever

2016 should prove to be a good year for asset acquisition. 2015 was once again a very confusing year and surveys are showing that between 80-90% of higher net worth clients (those who have at least \$500,000 or more with an advisor) are not happy with their primary advisor. This statistic means a great opportunity for you to acquire these clients. Those advisors who run a more systematized and disciplined practice set themselves up to achieve much higher levels of success and growth. Now is the time to take a step back and look at the following six things that you should be doing in order to maximize your success for 2016.

1. Re-evaluate your operating or business plan.

To make 2016 a great year, you should revisit your operating plan. In order to not only maintain your current clients, but also generate new clients, it is important to revisit your operating plan to make sure it is still accurate to the plans and goals you have for you and your firm. For example, have you redefined or identified the following areas:

- What is your primary niche?
- What is your marketing plan to acquire at least 15-25 new clients in this niche?
- Are you straying from your focus by helping clients that are outside of your niche?
- Is your business systematized?
- Are your services consistent?

2. Review your existing client list and ask yourself the following:

- Have you re-divided all of your clients properly into categories (Level 1-Level 2 or A/B/C?)
- Have you met with all of your Level 1 or A clients in the last 60 days?
- Do you have a plan for reducing your C clients?
- Have you held a full "Financial Physical" for all of your clients?

3. Revisit your time management and look for efficiencies.

- Keep a timecard for one week to determine how much time you are spending with clients versus non-productive activities.
- Have your assistant observe what you are doing when you are not meeting with clients.
- Have your junior rep sit in on your client meetings to learn how you are conducting the interviews while also giving them the ability to take over some of your lower-end clients.
- Make an action checklist of things you will change within the next 30-60-90 days.

4. Schedule at least 2 client workshops for 2016.

Client workshops are the ideal way for you to stay visible and keep clients happy. Have you:

- Scheduled at least two client workshops for 2016?
- Chosen topics your clients care about?
- Set up a system for holding client education events?

5. Revisit your system for communication with clients and prospects.

First and foremost, you must make sure your existing clients are happy. Then you can move on to attracting new prospects and clients. This is the ideal time to ask yourself:

- Are we communicating monthly with existing clients?
- Are we communicating monthly with identified prospects?
- What topics are interesting to our clients (taxes, estate planning updates, etc.)?
- Do our clients hear from us enough?

6. Are you staffed properly to make 2016 a smooth year?

If so, you can really focus on clients and prospects. High level producers spend 80-90% of their time with clients and prospects. Here are some questions to ask yourself:

- Are you spending 80-90% of your time with clients and prospects?
- Does your team handle all of the operations and paperwork?
- Do you have written systems for 90% of all your activities?

Now is the time to focus (or refocus) your **PRO** team so you can operate efficiently. By reviewing and maximizing your office's efficiencies now, you will generate much better results for 2016 and beyond!

Most advisors never make any changes and still expect to see different results. As we know, this is just a definition of insanity. Whatever you do, remember that the only thing constant is change. If you are not growing, you are dying!

Let's make sure that 2016 is your best year ever!

A Quick Guide for Creating and Maximizing Your Multi-Touch 12-Month Marketing Plan

In order to achieve your personal production goal in a very efficient and comfortable manner, you must think about and commit to scheduling a calendar for your marketing. This marketing plan, which you will then implement, should be one that takes into account your personal commitment to production. It should be centered around your time commitment and personal calendar so that you are continuously trying to maintain existing clients while building a pipeline of qualified prospects.



Five Star Tip

We have seen great results when a well organized schedule makes strategic timing changes and/or adds a few new marketing activities.

*Please remember: Be realistic with your expectations!
Small changes can lead to very strong results if properly executed!*

1. First, plan your primary marketing activities then add your other marketing activities.
2. When committing to marketing, remember to address all 3 groups that you interface with:

a. Clients**b. Referrals****c. Prospects**
3. When assigning each activity to a responsible person, make sure to list the time commitment required.

Example: Tom's Client Newsletter Printing & Mailing – 4 hours
Client and Referral Educational Workshop – 14 hours (including all planning time!)
4. On each activity, please list a reasonable investment amount.

Example: Client Letter Mailing (250 pieces x \$1) = \$250
Client and Referral Educational Workshop = \$1,500
5. Total up your Investment Amount and Time Commitment Amount for the year to determine if your plan is feasible. Then, and only then, should you add, eliminate or modify your proposed events!
6. **Remember – marketing is like oxygen, you need it to live healthy!**

Here is an example of what a typical month can look like:

Month	Marketing Activity	Person Responsible	Time	Investment
January	• Quarterly Client Meetings	Heather	20 hrs.	None
	• Client/Prospect Newsletter	Stevena	5 hrs.	\$900
	• Welcome to 2016 Letter	Stevena	5 hrs.	\$500
	• Client/Referral Workshop	Stevena	10 hrs.	\$1,500
	• Tax Report (Client/Prospect)	Stevena	5 hrs.	\$1,000

Warning: You must always have all marketing materials you use with your clients and prospects approved by your firm's compliance area!