

Step 2: Generate Leads with Marketing Toolkit

MARKETING PLAN BUILDER

There are many ways marketing can support your business goals, and help you grow. The right marketing approach depends on a few key things: your business goals, target audience, and strengths. Use the guide below to develop and act on a strong marketing plan.

1

Understand if you are set up for success

Complete the Marketing Scorecard

Address anything ranked “no”

2

Define your marketing plan

Reference your business plan for alignment of:

- Strengths and opportunities (per your SWOT/SCOT analysis)
- Business and marketing goals

Build your plan with the One-Page Marketing Plan template on page 2

Determine the best marketing strategy and tactics using the guide and resources on page 3

3

Activate your marketing plan

Ensure you’re set up for success with the Marketing Activation Checklist

Use the Goals to Outcomes Worksheet to break your goals into smaller, daily, weekly, monthly, or quarterly tasks

Step 3: Generate Leads with Marketing Toolkit Name: _____ Date: _____

MARKETING ACTIVATION CHECKLIST

Ready to start marketing? Use this checklist to ensure you have what you need for success.

Marketing Plan	Strategy	Tactics	Collateral
<input type="checkbox"/> We have a formal marketing plan <input type="checkbox"/> The plan has been communicated & has buy-in <input type="checkbox"/> Our plan supports our business vision and goals	<input type="checkbox"/> It is realistic to reach our marketing and/or business goals with this strategy <input type="checkbox"/> Our strategy is aligned to our target audiences' preferences and behavior <input type="checkbox"/> We have (or have found) the strengths, resources, and capabilities to do this well	<input type="checkbox"/> Every tactic has an owner <input type="checkbox"/> Our tactics are aligned to our audiences' preferences and behaviors <input type="checkbox"/> We have (or have found) the strengths, resources, and capabilities to do this well	<input type="checkbox"/> We have the capabilities to build the collateral (copy and design assets) needed or have found a partner to help <input type="checkbox"/> All collateral includes a clear and compelling call to action (CTA) <input type="checkbox"/> The content is focused on our audience's needs
Promotion	Execution	Metrics	Need Help?
<input type="checkbox"/> We have identified the right channels to reach our target audience <input type="checkbox"/> We have a content calendar or plan to deliver content consistently <input type="checkbox"/> Our content is high-quality and engaging to our target audience	<input type="checkbox"/> We have broken our goals into smaller tasks, we know what we need to do this week, month, and quarter <input type="checkbox"/> Every strategy and tactic has an owner <input type="checkbox"/> We have the time, resources, capabilities, and commitment to execute the plan or have found a partner to help	<input type="checkbox"/> We have identified key performance indicators (KPIs) for each strategy <input type="checkbox"/> We have the data and ability to report on these KPIs <input type="checkbox"/> We review (or will review) these at least quarterly and adjust as needed <input type="checkbox"/> We know when to stop or pivot	<ul style="list-style-type: none"> • Find a marketing partner • Use the Goals to Outcomes tool as a project planning template • Ask your WAA business development representative and they can direct you to the right resources

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Step 2: Define Leads with Marketing Toolkit Name: _____ Date: _____

ONE PAGE MARKETING PLAN

Your marketing plan should align and support your business goals, and may supplement your One-Page Business Plan. Watch this brief introductory video and use this template to formalize your marketing plan, or a campaign, which is a time-bound effort that seeks to drive specific results.

1. **Timing** Target Start Date: _____ Target End Date: _____ Ongoing
2. **Marketing Objective(s)** If more than one, prioritize: Support/Retain Clients Gain Awareness Generate Leads
3. **Marketing Goals** List specific desired outcomes: _____
4. **Marketing Budget** _____
5. **Target Audience** _____

Strategy	Tactic(s)	Collateral	Promotion	Execution	Metrics
Your approach	Your actions	Content and call-to-actions (CTAs)	Where (channels) and how to reach your target audience	Resources needed to execute (owners, technology, etc)	How will you know how you're doing?

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Step 1: Generate Leads with Marketing Toolkit Name: _____ Date: _____

MARKETING SCORECARD

Marketing is how you communicate and deliver value. It can be a significant driver of growth. Watch this brief introductory video and complete the scorecard below to understand if you have what you need to succeed at growth through marketing. Any question that is not a confident "Yes" is an opportunity to enhance your approach.

	Yes	No	If "No"...
INFRASTRUCTURE			
Do you have a formal, documented marketing plan?			Proceed to Step 2: Marketing Plan
Are your marketing objectives and goals clear and align to your business goals?			<ul style="list-style-type: none"> • Toolkit: Business planning • Establish SMART goals
Do you have a clear target audience, understand and speak to their specific needs, and are able to effectively reach and engage them?			<ul style="list-style-type: none"> • Toolkit: Develop an ideal client persona • Toolkit: Articulate your value • Make sure you're using the right strategy & tactics
Do you have a strong website that is optimized for leads?			Take the FMG website assessment
If you're actively using marketing to grow, are you happy with the results?			Review the 6 reasons why your marketing efforts may not be working
Do you have the right resources (human and technology), skills, and/or partnerships to produce quality marketing output and outcomes?			Determine how to gain marketing capacity and competency
Are you able to consistently convert leads to clients?			Define your sales process
Do you track, review, and make decisions based on key metrics?			Use marketing metrics like a pro
OUTCOMES			

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ONE PAGE MARKETING PLAN

Name:

Date:

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1	Timing	Target Start Date: _____	Target End Date: _____	___ Ongoing
2	Marketing Objective(s)	If more than one, prioritize: ___ Support/Retain Clients ___ Gain Awareness ___ Generate Leads		
3	Marketing Goals	List specific/desired outcomes:		
4	Marketing Budget			
5	Target Audience			



Strategy	Tactic(s)	Collateral	Promotion	Execution	Metrics
Your approach	Your actions	Content and call-to-actions (CTAs)	Where (channels) and how to reach your target audience	Resources needed to execute (owners, technology, etc)	How will you know how you're doing?

MARKETING STRATEGY AND TACTICS GUIDE

Below is an overview of common marketing strategies and tactics used by advisory firms. Start by watching the expert advice segments for best practices of each strategy and to determine if that strategy may make sense for you.

STRATEGIES Your approach	EXPERT ADVICE Is this strategy right for you?	SAMPLE TACTICS Your actions	RESOURCES
Referral Marketing		<ul style="list-style-type: none"> • Client referrals • Centers of Influence (COI) referrals • Client surveys 	Referrability paper Client survey [Absolute Engagement]
Content Marketing		<ul style="list-style-type: none"> • Website • Social media • Blogging • Book author • Gated content • Newsletter • Podcasting • Video 	<ul style="list-style-type: none"> • Customized magazines [ReMinder Media] • Podcasting [ProudMouth] • Content Marketing: AdvisorStream All-in-one marketing including websites: <ul style="list-style-type: none"> ◦ FMG ◦ Snappy Kraken
Event Marketing		<ul style="list-style-type: none"> • Virtual • In-person 	
Media		<ul style="list-style-type: none"> • Paid (advertising/sponsorships) • Earned (featured/quoted, top advisor lists) 	<ul style="list-style-type: none"> • helpareporter.com
Networking / Social Selling		<ul style="list-style-type: none"> • Join targeted groups/boards • Volunteer • Network 	
Outsource		<ul style="list-style-type: none"> • Paid lead services • Curated content platforms • Hire a marketing resource or copywriter 	<ul style="list-style-type: none"> • SEI's strategic partners