

eWorkbook

Marketing blueprint & 90-day marketing plan



Beautiful business



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Marketing blueprint: the strategy

The marketing blueprint is designed to help you build a tailored marketing plan for your practice. The blueprint is split into three sections with three boxes in each.

- The first section talks about prospects: who you want to work with, what their pain points are, and where they hang out.
- The second is about clients: how you keep them happy, how you'll up-sell and how you'll get referrals.
- The last section is about leads: how you'll turn prospects into leads, nurture them, and turn them into clients.

So the marketing blueprint covers the whole marketing cycle.

This blueprint is based on the Bizink marketing blueprint – see www.bizinkonline.com



Prospects

Who is your ideal prospect and what are their pain points?

How do you solve the pain points of your ideal prospect?

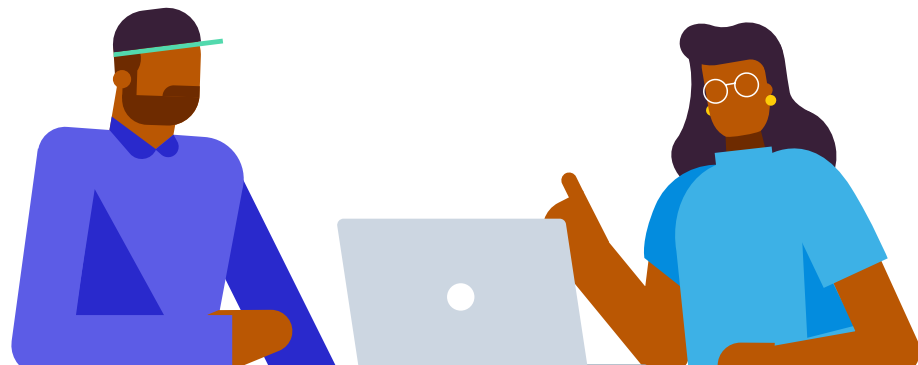
Prospect map: Where does your ideal prospect hang out?

Clients

How do you keep your customers happy?

How will you get more sales from existing clients?

How do you get clients to give you referrals?



Leads

How will you turn prospects into leads?

How will you nurture your leads?

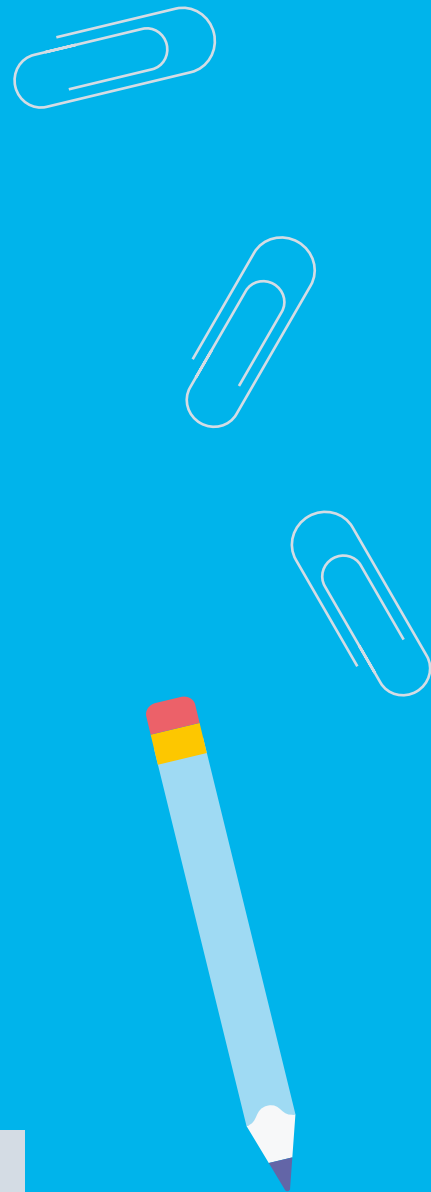
How will you turn leads into clients?



90-day marketing plan: the tactics

This plan details your marketing activities over the next three months and keeps you on track and accountable. One of the biggest problems advisors have when marketing their firm is perseverance.

Grand ideas and plans for marketing are great but after a few weeks the busy work takes over and marketing gets dropped. The 90-day action plan helps you create a workable system for marketing your business.



90-day action plan

| | |
|----------------|----------------|
| WEEK 1 | WEEK 2 |
| | |
| WEEK 3 | WEEK 4 |
| | |
| WEEK 5 | WEEK 6 |
| | |
| WEEK 7 | WEEK 8 |
| | |
| WEEK 9 | WEEK 10 |
| | |
| WEEK 11 | WEEK 12 |
| | |

Content, tech and metrics

Content and messaging

Now that you have your marketing strategy, ideal prospect, and how to reach them, what are you going to say? Use this section to list ideas for both marketing tactics and campaigns.

Marketing tactics:

Campaign/promotion ideas:

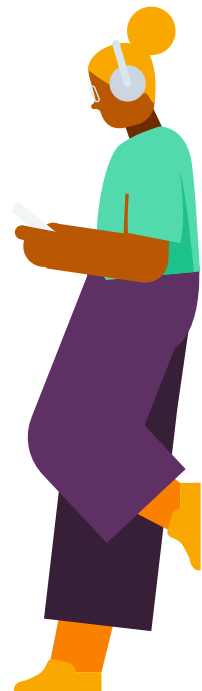
Tech and systems

Technology is an important part of any great marketing strategy. Use this section to outline your wish list of features. If your existing app(s) meets those standards, start a list of alternatives to research during your next tech review.

CRM:

Email marketing:

Website:



Marketing strategy: key metrics

Marketing is a numbers game that starts with determining how many new clients your business can bring onboard each month. Use this section to calculate how many leads and meetings are necessary to land your ideal clients each month.

| | |
|---|--|
| Number of new clients wanted per month | |
| Sales conversion rate (meetings to sales) | |
| Meetings needed | |
| Marketing conversion rate (leads to meetings) | |
| Leads needed | |



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