

MARKETING MADE EASY

NEWSLETTER JULY 2024

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GETTING BACK TO BASICS WITH BULL'S-EYE MARKETING: PART 1

Those of you who have used our marketing programs for many years know that our offerings have expanded, and our strategies have evolved in various ways. That's to be expected, of course, and it means you can rest assured knowing we are always working to streamline and improve the effectiveness of our tools and strategies on your behalf. Many changes and additions are, of course, the result of new technologies and social trends that have emerged over the past decade: the expansion of social media platforms for example, along with their increased popularity among our target audience. Another example is the importance of having and maintaining a high-quality website that is search engine optimized, and still another is the increase in opportunities for video marketing.

Remember the Dart Board?

With all this said, the emergence of new tools and strategies doesn't mean that our legacy programs have gotten any less effective. Far from it. That's why in the next several issues of Marketing Made Easy, we're going to get "back to basics" with an ongoing review/reminder of all the great turnkey strategies available to you through our Bull's-Eye Marketing system.

As most of you know, the concept behind Bull's-Eye Marketing is that of a dart board in which the outer rings represent the "coldest", least-targeted lead-generation tactics (things like direct mail, appointment setting services, and seminars), while the rings closer to the bull's-eye represent "warmer" more strategic approaches (e.g. client appreciation events, direct referrals and so on). The point is that the more often you can focus on the warmer strategies, the bigger bang you're getting for your marketing buck, and the more you're doing to eventually achieve self-sustained growth – in other words, to build a business that grows largely through referrals and by attracting new clients instead of chasing them.



The Bull's Eye: Clients

In this month's newsletter, we're going to focus on the warmest of all the warm areas on the dartboard: the bull's eye itself, which represents strategies targeted toward existing clients.

As every good advisor knows, one of the most effective ways of attracting new clients is by taking great care of the ones you already have. Strong client relationships are the cornerstone of the warmest and most effective strategies in the Bull's-Eye Marketing toolkit. By being visible, accessible, and proactive with your clients, you earn trust and appreciation that can be leveraged to grow your business without having to rely so much on cold, costly marketing strategies geared toward chasing prospects rather than attracting them.

As a reminder, here are the marketing strategies designated as Bull's-Eye approaches in our system:

Client Survey

A well-crafted client survey will let your clients know that their input is important in your ongoing efforts to better serve them, while at the same time generating information you can use to help you effectively implement many other Bull's-Eye Marketing strategies. While New Year's is often a good time to send out a new survey, any time is good if you haven't done one in a while.

Client Categories

A strategic client categorization system helps you maximize your time with clients by identifying the ones who present the most potential opportunities for helping you grow your business. Our system organizes clients alphabetically from A through D and includes strategies for leveraging internal growth and referral opportunities from each, while focusing especially on A and B clients.





Client Reviews

One potential pitfall of a strong client relationship is that the personal nature of it can throw an advisor off-track in his meetings with a client, in which case he may end up walking over many good opportunities for both new business and referrals. That's why our strategic eight-step client review process is specifically designed to keep you on track during your annual or bi-annual reviews, and ready to recognize and take advantage of every opportunity.

Drip Campaigns, Newsletters, Webcasts, etc.

These are some of the strategies that have been refined, expanded, and generally improved upon over the past decade based on new technology and other trends, as discussed at the top of the newsletter. Now more than ever, it's possible to stay in front of clients and demonstrate their importance to you with things like educational videos, newsletters, email campaigns, social media posts, and much more – in addition to more traditional methods like quarterly client service calls and greeting cards. The results of these types of efforts are typically threefold: 1) client retention. 2) more opportunities for new business from existing clients. and 3) referrals.

Summary

Once again, for all the evolution and growth in our marketing programs over the years, the foundation of the platform – both philosophically and tactically – remains Bull's-Eye Marketing. You can reach out to the Marketing Team at any time for help with implementing any turnkey Bull's-Eye program or strategy.

Be sure to check in against next month when we review Ring 6 on the Bull's-Eye Marketing dart board: strategies targeted toward referrals!





MONTHLY MEGAHIT

Agnieszka (Aggie) Valenta, MSPFP, CFP®, MPAS®, APMA®, ABFP®, CRPC®, AWMA®, SE-AWMA®

Each month we like to feature an advisor who is doing exceptional work. This month we are featuring Aggie Valenta at Scranton Financial Group. Aggie was born in Poland and has lived in New England since 1992. She earned a Master of Science in Personal Financial Planning from the College for Financial Planning, a Master of Science in Business Administration from the University of Hartford, and a Bachelor of Science degree in Business Management with a concentration in Accounting from Westfield State University. Aggie has numerous designations, in addition to holding Series 7, 66, Life, Accident and Health, and NMLS licenses.

In her free time, she is an ultra-marathoner, author, hiker, kayaker, and world traveler. She and her husband, Christopher, have three children. Together, they support many health charities, with a focus on autism.

Primary Coach Rick Bates had this to say:

“Aggie joined us via Scranton Financial Group initially as a Client Service Advisor in 2022. She has now transitioned into a Client Acquisition Advisor. Aggie has taken off in her new role. She has been holding workshops, closing prospects, and bringing in a bunch of assets. Congrats Aggie, your hard work is paying off.”

Well done, Aggie, and best wishes for your continued success!

