

ADVISOR ROADMAP



# MARKETING PLAYBOOK

The Advisors Guide to Marketing

# DISCUSSION POINTS

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## DISCOVERY PATH

- Market Research (know your audience)
- Define Your Value (what sets you apart)
- Set Your Goals
- Make a Plan
- Get Organized

## MARKETING TOOLS

- Website
- Social Media
- Email
- Direct Mail
- Analytics



# BRIEF INTRODUCTION

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YOUR TRUSTED SOURCE  
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Are you looking for tools and ideas to grow your market and expand business opportunities? There are so many options available, how to know where to begin and what to focus on. The task can seem daunting, but it is easily simplified by breaking it down into tried and tested steps.

Like most multi-step tasks, creating a written plan with measurable results will help you achieve your goals. We have evaluated all the newest tools and options, and the best ways to combine them, to help you create and implement an up-to-date, effective marketing plan that will reach your specific audience and drive business.

Read on for step by step instructions and easily accessed tools to make your marketing goals into realities.

DISCOVERY PATH

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**THE ART OF MATCHING  
PRODUCT BENEFITS WITH  
A CONSUMER'S NEEDS.**



# MARKET RESEARCH

KNOW YOUR MARKET, GROW YOUR BUSINESS

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To expand your reach, your book of business, and your opportunities, you will first need to know your market. Understanding who you are trying to reach is fundamental to fine-tuning your pitch and your offerings. Knowing your market lets you find where your prospects are and how to reach them.

Download this handy guide to navigate communication across various generations. [How you approach Millennials is very different from how you approach Baby Boomers.](#)

Did you know that:

- 47% of Gen Xers bought something because of an online or social media ad. ([source](#))
- 22% of Baby Boomers purchased something because of an online or social media ad. ([source](#))

Or that:

- 4 in 5 consumers want ads customized to their city, zip code, and area. ([source](#))
- 4 in 5 consumers use search engines to find local information and businesses. ([source](#))



# MARKET RESEARCH

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## STEP 2: KNOW YOUR COMPETITORS

Research your competitors and gain an understanding of how they are reaching your marketplace. Take a moment to learn about posting on social media, running a Google ad, or studying the analytics of your website and in the process, you will find your customer and what they want.

Every single week, content in the LinkedIn feed is seen **9 billion** times.

[Download this handy guide to creating a LinkedIn strategy.](#)

# DEFINE YOUR VALUE

MASTER YOUR MESSAGE AND MOVE THE MARKET TO YOU

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Once you understand where to find your audience and what they are looking for, it is time to reflect on the value you are providing them. Define your value proposition using the knowledge you've gained from researching your market.

Take the time to write this out with three goals in mind:

## CLARITY

Your value should be easy to understand in a single sentence. Avoid jargon and hyperbole and aim for a straightforward approach that both grabs your audience's attention and clearly states the benefit of your offering.

## RELATABILITY

With the knowledge of who your audience is, your value proposition should respond to their needs and speak to how your offering fulfills those needs.

## DIFFERENTIATION

The value proposition should also define what sets you apart from your competitors. If the value proposition itself is similar to what your competitors are offering, examine how your approach or delivery is better suited for your audience.

# DEFINE YOUR VALUE

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## STEP 2: USE YOUR VALUE MESSAGE IN YOUR MARKETING

This defined value will be used in your marketing efforts, on your website, in ads, and in your overall pitch to the audience. Write, edit, and hone it until you feel it is as good as it can be. Share it with friends or trusted clients and get their opinion.

Make sure that it clearly answers these basic questions:

1. What are you selling?
2. What is the benefit of your offering?
3. How is it different from your competitors?
4. Who does it benefit?

[Check out this guide for writing a Value Proposition.](#)



# SET YOUR GOALS

You know your market and you've defined your value. This is where setting goals for your marketing campaign and outreach come into play. Goals allow you to keep your campaign focused on a few key metrics that are achievable, measurable, and actionable. Let's break that down.

## Achievable

While obtaining 1000 new clients would be a welcome outcome, depending on the size of your operation, it might not be realistic. Success happens in increments and your goals should reflect those increments. Keep this in mind when crafting your goals.

## Measurable

The best part about creating measurable goals is that it will help you spend your marketing budget in the most efficient manner possible. Being able to see which ads or blog posts are actually moving the needle on one of your goals helps you know where to spend more time and effort and where to spend less.

## Actionable

Each of your goals will have milestones. As you hit certain milestones, more action will need to be taken to get to the finish line. Be certain to understand and think about what you will do as you succeed in pushing these goals forward with your campaign.

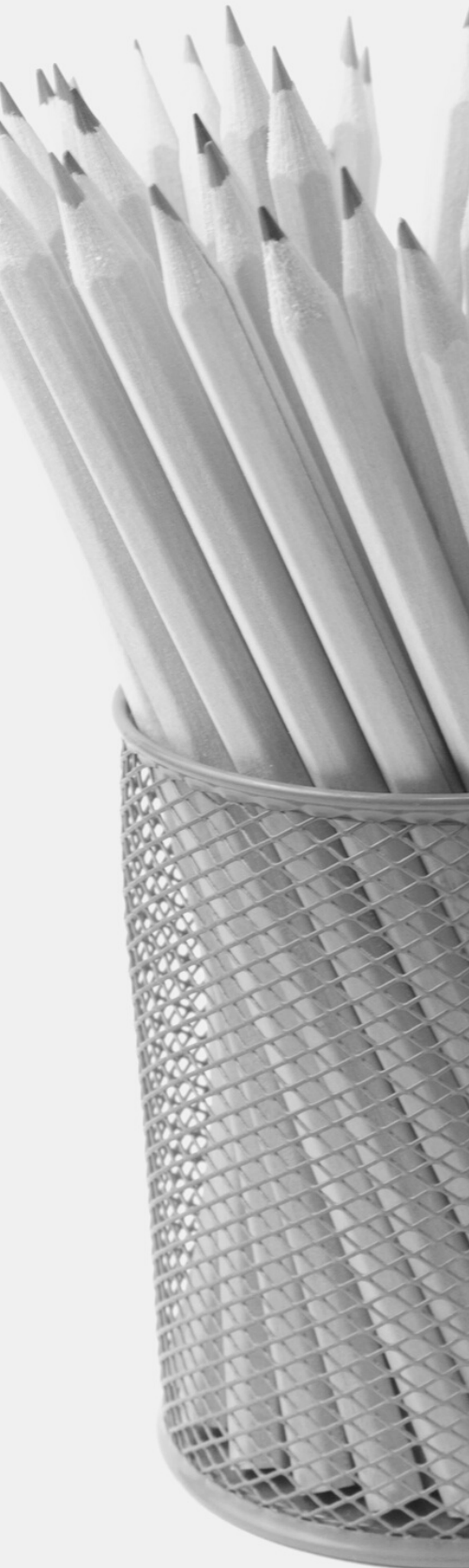
# MAKE A PLAN

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A solid marketing plan allows you to know what to do and when to do it. There can be many angles to a successful marketing campaign. Some or all of these marketing approaches may come into play as you write up your overall marketing plan.

1. Creating or updating your website
2. Crafting and testing ads
3. Creating a social media posting schedule
4. Email campaigns to existing clients
5. Direct mail campaigns

As you might imagine, each approach will have a plan for its own success. The good news is that many of these marketing options are free or cost very little to implement outside of your time. Additionally, you can hire a marketing consultant firm to help create and maintain these campaigns. Take a look at the goals that you created and make a decision on which marketing approach will best suit each goal.



# MAKE A PLAN - STAY FLEXIBLE

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## STEP 2: BE OPEN TO FEEDBACK

In the beginning, a marketing plan is not a turn-key effort. As you move down the road towards your goals, you will learn which approach works better than others and will need to shift your resources accordingly. It is similar to an A-B test. If you are running an ad, consider running a few of them and alter the language of your value proposition to gain insight on which language works.

Build flexibility into your marketing plan wherever you are able to. If you are creating or updating your website be willing to try different ideas to identify performance benchmarks. Put yourself in the shoes of your intended audience. Sometimes moving a call to action button to a more prominent position on the page can be the difference between success and failure. Your flexibility will allow you to take advantage of all the information you have collected on your audience.

# 9 BILLION

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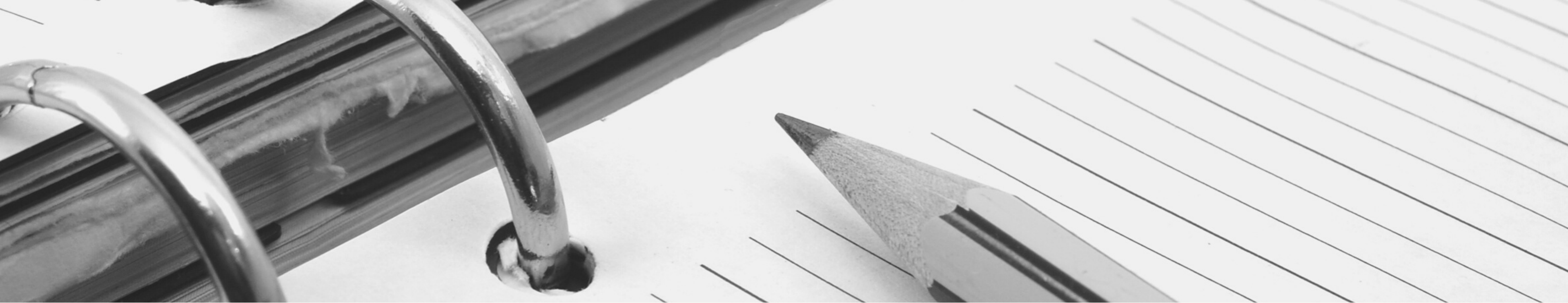
number of views a Linked In news  
feed post receives in a week



# 80%

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percent of consumers using search  
engines to find local information  
and businesses



# **GET ORGANIZED**

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You will want to be able to quickly analyze all of the information that you receive from your marketing campaign. Getting organized is nearly as important as the campaign itself. There are countless free and paid tools to help you track your progress as you achieve your marketing goals.

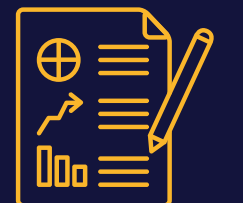
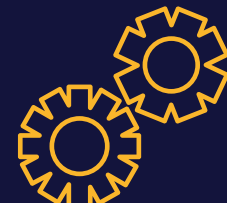
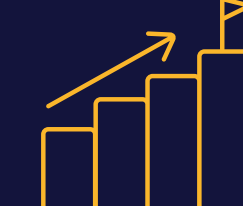
From email scheduling systems to Google Analytics, you will want the ability to quantify each aspect of your campaign so that you can capitalize on every opportunity.

Read on for invaluable resources that will help keep you organized.

MARKETING TOOLS

# TOOLS AND TIPS FOR REACHING YOUR AUDIENCE & QUANTIFYING SUCCESS

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# WEBSITE



If you don't have a website then your first item of business is to make one. There are so many tools today that allow you to craft a basic website that showcases your product and your approach to client service. The website is the focal hub of the majority of your marketing efforts. Tools such as WordPress, Wix, Squarespace, and Unbounce provide intuitive drag and drop interfaces to let you create a beautiful storefront with minimal to no coding experience, so don't be overwhelmed by the prospect of starting from scratch.

If you already have a website now is a perfect time for a little housekeeping.

- Is your site connected to Google Analytics?
- Does it have a sitemap so that search engines can find you?
- Does the look and feel match the aesthetic of the modern web or is it more of a throwback to the early 2000's?

For new sites and existing sites, take a look around the internet and find what appeals to you. It never hurts to check in on your competition and see what they have done to highlight their offerings. If you want people to engage with your website make sure that you engage with it as well.

# WEBSITE BUILDERS

Wix

Squarespace

Wordpress

Unbounce





# SOCIAL MEDIA

Social media has become an essential part of modern marketing campaigns. Facebook, Instagram, and LinkedIn are where your audience lives online which means that marketing to them on these platforms is a fast way to connect them to your services. Maintaining a presence on these platforms yourself allows you to let people know what your business is about and more importantly, what it is up to. Posting regularly on these sites creates an opportunity for a conversation within your niche.



It's important to understand that social media marketing is not a substitute for your other marketing channels but rather a booster for them. It presents a unique way to get your message to a larger audience while channeling them through your marketing funnel. Done correctly and authentically, social media can expand the reach of your marketing efforts while building brand awareness and loyalty. The goal of social media marketing is to create relationships with your audience. From a marketing perspective, this boils down to consistency. Post consistently, respond to comments consistently, and keep your message consistent in the process.

There are tools to help you achieve the social relationships that will help your business thrive.

Did you know that?

Two thirds of all U.S. adults are on Facebook?  
Twitter adds 300 thousand users everyday?

# **SOCIAL MEDIA RESOURCES**

[Trust Financial Grab and Go Graphics](#)

[Beginnner's Social Media Guide](#)

[Canva](#) - graphics

[Hubspot](#) - CRM and tools

[HootSuite](#) - social media management

[SproutSocial](#) - social media management



Email is still one of the best ways to communicate with your existing audience and letting them know about additional services and products you're offering. It's also an opportunity to check in with them about upcoming events, policy reviews, and paperwork status updates. Seeing as you don't want to spend time emailing each and every client individually, there are fantastic tools to help you manage and organize your communications effectively and intentionally.

While nobody wants to receive solicitations in their inbox every day, a well thought out email marketing campaign that respects the reader's time can be immensely successful when you want to get a new product in front of your current clients and website subscribers.



# EMAIL

Craft your emails with the same care that you crafted your defined value. If your emails matter every time you send them, your open and click-through rates will skyrocket over time. Here are some tools to help you manage your email campaigns along with some templates you can use to get you started!

# EMAIL RESOURCES

[Trust Financial Grab and Go Email Templates](#)

[Email Marketing Management](#)

[Mailchimp](#)

[Constant Contact](#)

[MyEmma](#)



# DIRECT MAIL

Did you know:

42.2% of direct mail recipients either read or scan the mail they get.

Direct mail offers a 29% return on investment

It may sound archaic to send physical envelopes to the homes of your audience but in reality, 18% of B2B marketers' budgets are assigned to direct mail marketing and print advertising. While digital marketing can be easier to implement, direct mail has the advantage of getting your message into peoples' homes. It's an incredible way to let people know that you are in their neighborhood and open for business. Additionally, there are so many ways to brand yourself with direct marketing. From a simple business card, to a refrigerator magnet, direct mail remains in the home long after an email is deleted from your client's inbox.

Here are some tools to get you started on  
your road to the post office.



# DIRECT MAIL TOOLS

Vistaprint - business printing

NextDayFlyers - online print flyers

Canva - print graphics and design



# ANALYTICS

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You'll need to be able to understand the data that you receive from your marketing efforts. There are countless tools to assist you with this but the key takeaway here is that you look at the data often and respond to trends that emerge. Statistics on your website, social media, and email campaigns may each require different tools. Understanding which ones to use and taking a tutorial on how to use them will help you stay on top of your target and below your budget.



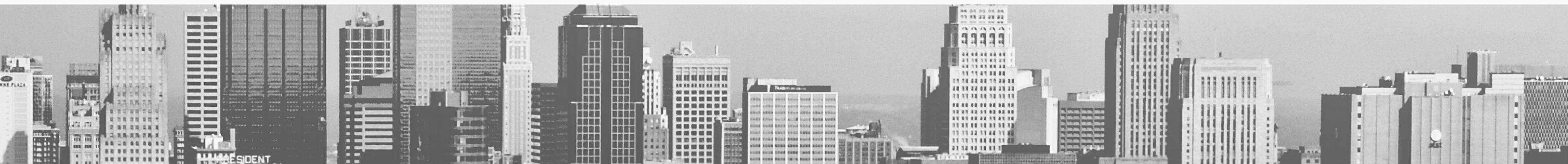
# GOOGLE ANALYTICS

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## TRACK TRAFFIC AND BEHAVIOR ON YOUR WEBSITE

For your website, the most important tool is Google Analytics. If you have a website that you are driving potential business toward, you will want to know how each page of that website is performing with your audience. Google Analytics is a free tool that tells you how many people are visiting your site, where they are coming from, and what they do once they are on your site.

The amount of data can be overwhelming but there are a few key metrics that will let you know how the marketing of your website is performing. You may need some assistance connecting Google Analytics to your website (although there are tutorials online to accomplish this yourself), but once Google Analytics begins to collect data, you will be able to log in and see what people are doing on your site. Here is a list of some terms that you will need to know in order to understand the data being presented to you.





# OTHER ANALYTIC TOOLS

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For your Social Media Campaigns, each platform has its own tools that help monitor your clicks, likes, and views.

- [Facebook Insights](#) provides a detailed accounting of how visitors are interacting with your page and your posts.
- [Twitter Analytics](#) does the same for your tweets.
- [LinkedIn Analytics](#) does, you guessed it, the same for your **LinkedIn Page**.

For your email campaigns, you will be able to access details about how your target audience is responding to your content. Each service has its own reporting metrics that work out of the box when you sign up.

The point is that each of these data sets will help you hone your message and achieve the goals you created for yourself. Anything that you can do to make your time more valuable is paramount to your success. Understanding the data will save you time in the long run so it is well worth taking an hour each week and reviewing how each of your campaigns is progressing.

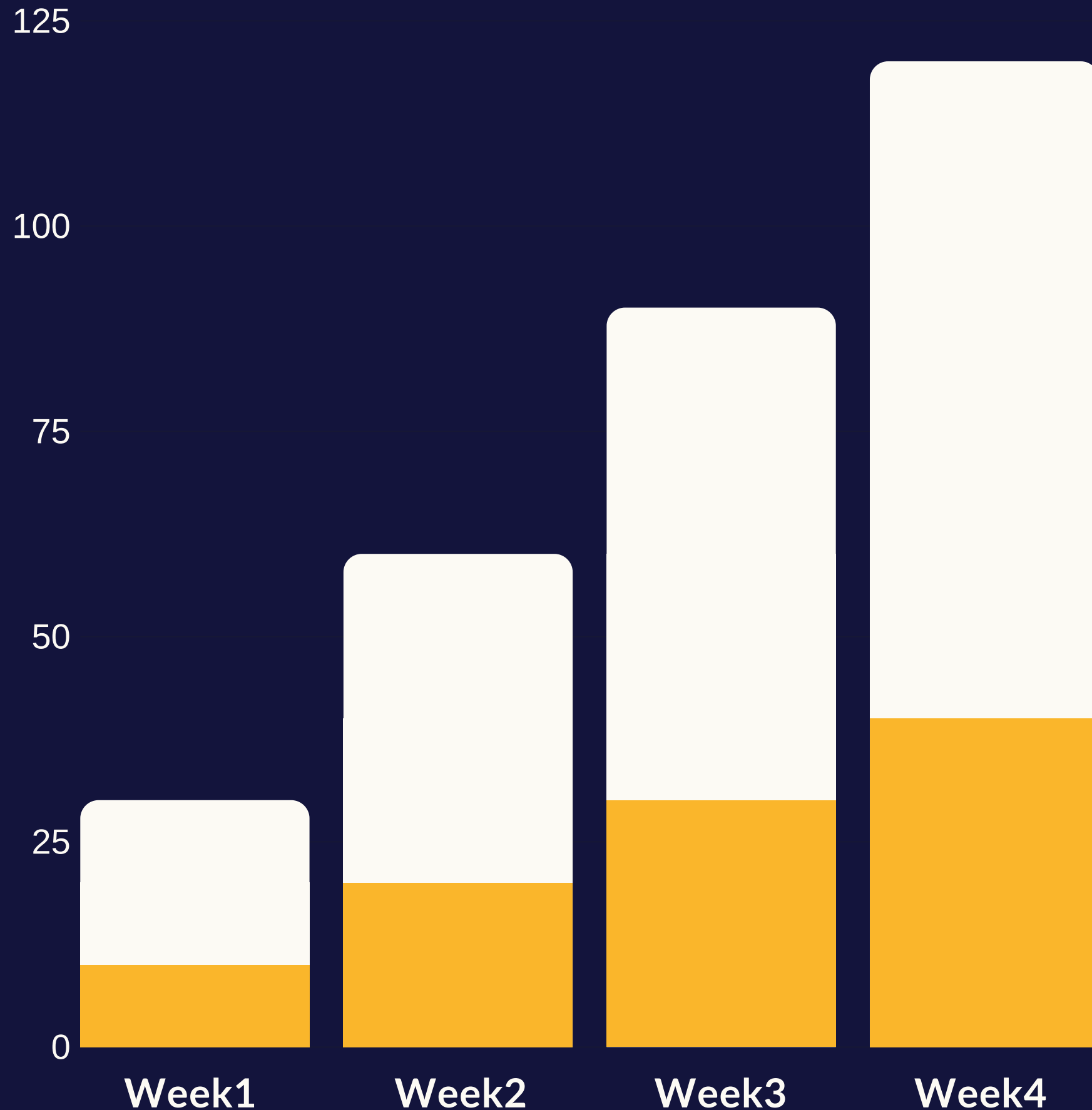
# SUMMING IT UP

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## MARKETING PLAYBOOK

Take some time to review the information, then use it to kickstart your marketing efforts.

Don't forget to know your audience and competition, define your value, set goals, and then make a plan. Break that plan down into manageable steps, complete the most urgent, and then add a tool or two as time allows to start growing your business.



WORDS OF WISDOM

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**THE BEST MARKETING DOESN'T  
FEEL LIKE MARKETING.**

Tom Fishburne

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