

Owner Engagement Strategies for the Professional Advisor



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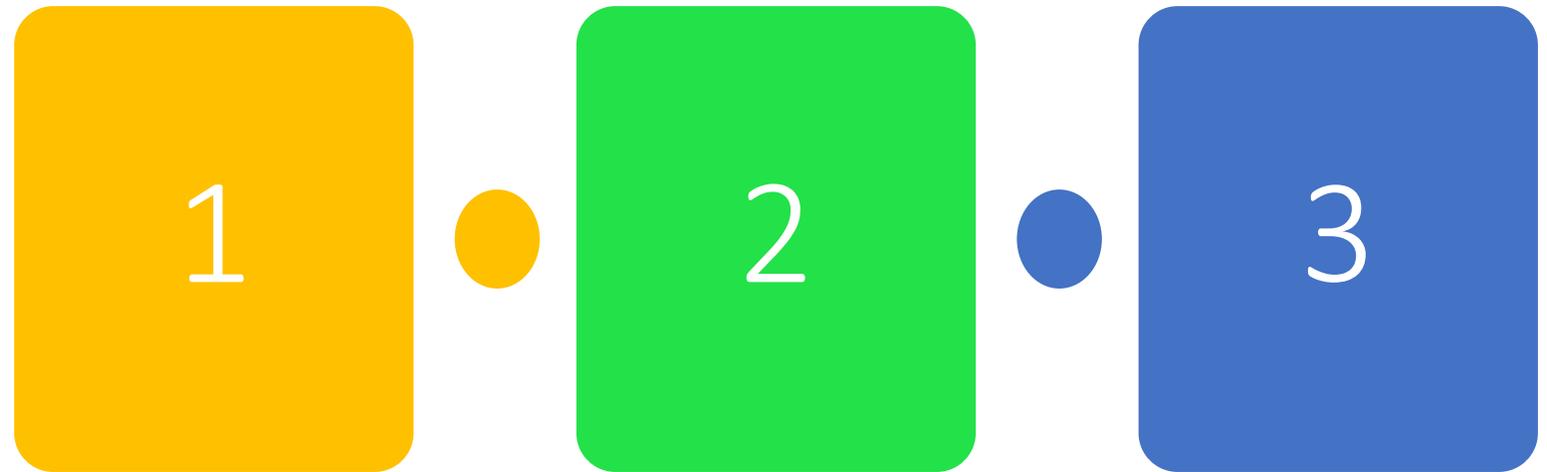
Scott Snider,
Vice President, EPI
Operating Partner, SPG



Instructor:

Brooke Norman,
Vice President of Marketing
Exit Planning Institute

**Which
Box Best
Describes
You?**



Critical Areas for Integrated Marketing

-
- Primary Objective(s)
 - Competition
 - Risks
 - Internal Messaging
 - 90-day goals / milestones
 - 180-day goals / milestones
 - Budget
 - Other resources required
 - Tools
 - Addressable Market(s)
 - Branding Strategy
 - External Messaging
 - Marketing Strategy
 - Marketing Tactics

Buyer Persona

1. Personal Background
2. Company
3. Role
4. Challenges
5. Goals
6. Watering Holes
7. Shopping Preferences



Who are
you
talking
to?



Tailoring Your Message



- How do Boomers like to be communicated with?
- What values do Boomers have that affect your message?
- What pain points do Boomers have?

Case Study Example

The Integrated Marketing Strategy:



- What were the integrated marketing strategies
- How did AMI engage fellow advisors
- How did AMI engage business owners
- How did we grow the business

Step 1: Filling the Funnel

Leads Funnel in from Different Sources

**Inbound Strategies
Identify Suspects**

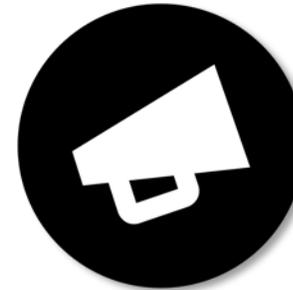
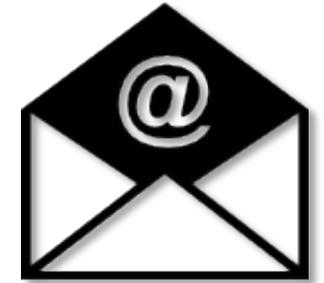
**Interactive Education
Nurtures Prospects**

**Personal Outreach to
Qualified
Opportunities**

Business Won

Lead Sources & Sales Channels

- **Email Campaigns**
- **COIs & Client Referrals**
- **Social Media**
- Website/SEO
- **PR/Media**
- **Sponsored Events**
- Purchased Lists
- **Direct Mail**
- Existing Clients



Existing Clients

Consider your client book opportunity

A funnel diagram consisting of five horizontal bars of decreasing width from top to bottom. The bars are white with a thin blue outline and rounded corners. The top bar is the widest, and each subsequent bar below it is narrower, creating a funnel shape.

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Existing Clients

Your Corporate Clients

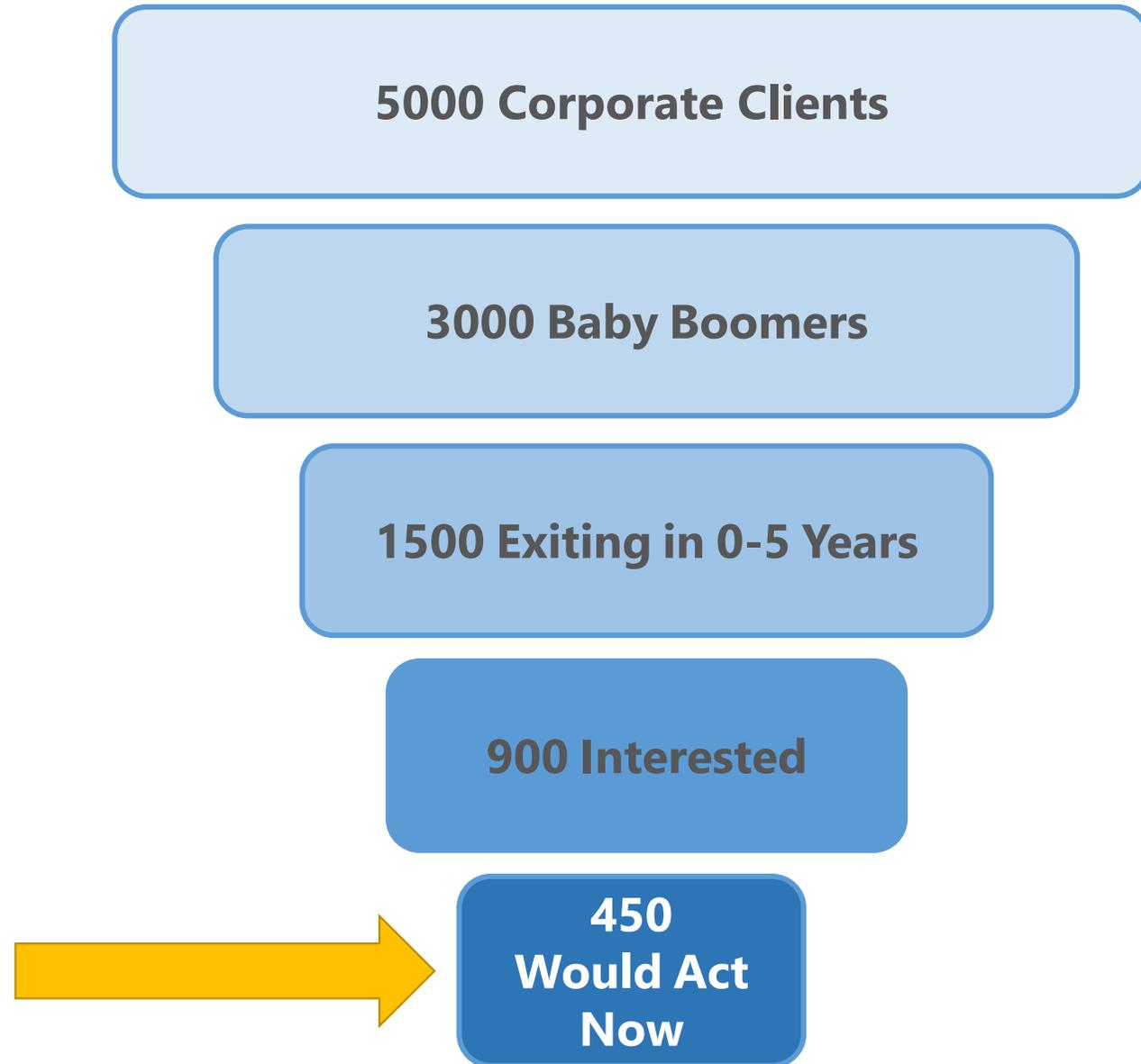
66% Baby Boomers

**50% Transitioning
in 0-5 years**

Middle 60%

READY NOW

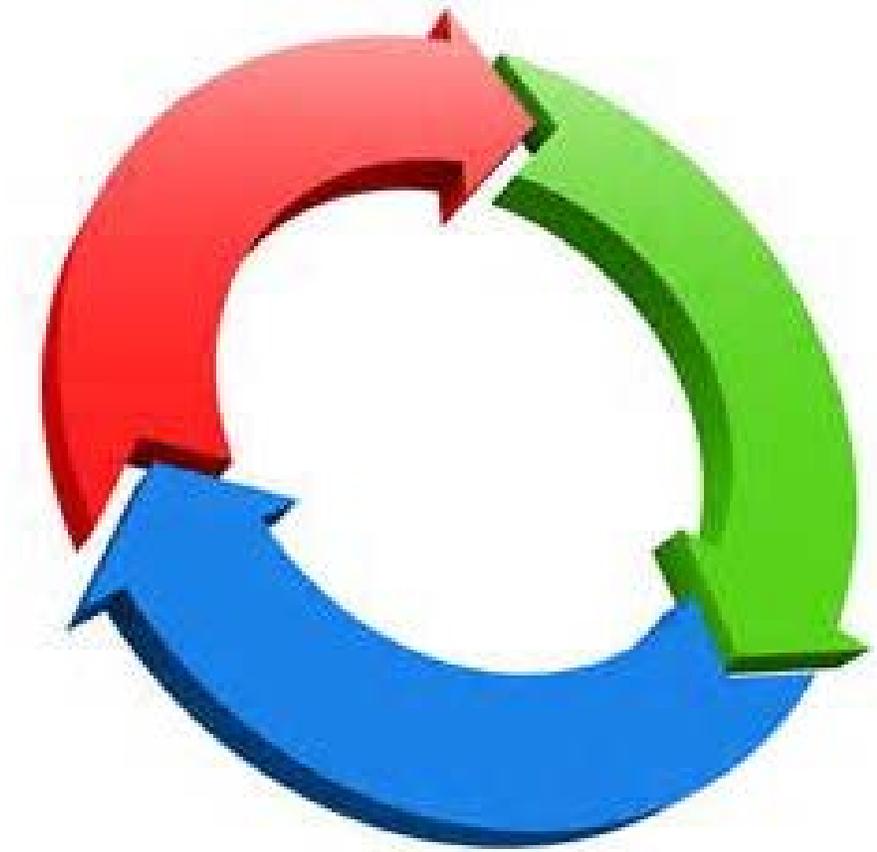
Existing Clients



Step 2: Engage

- *Structural Capital*
- Email
- COIs
- Social Media
- Website/SEO
- CRM System
- Content Marketing
- PR/Media
- **Inbound Marketing**
- Sponsored Events
- Private Events
- Speaking Engagements
- Referral Programs
- Direct Mail
- Webinars
- Lead Generation

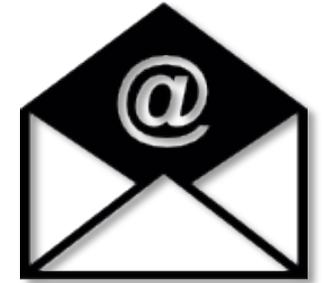
The Relationship



Effective Email Marketing



Effective Email Marketing

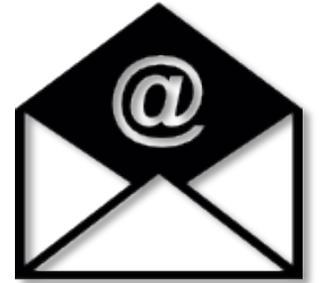


- Build your database email list!
- Send quality content, survey links, and visually appealing emails to your target audience regularly
- Augment your efforts with personal email outreach
- Monitor your click-through rates and queries and make personal follow-up where appropriate

Effective Email Marketing

9 Critical Components:

- Subject Line
- Sender Name
- Personalization & Relevance
- Body Copy
- Image
- Call-to-Action
- Social Sharing Links
- Unsubscribe Link
- Mobile Optimization

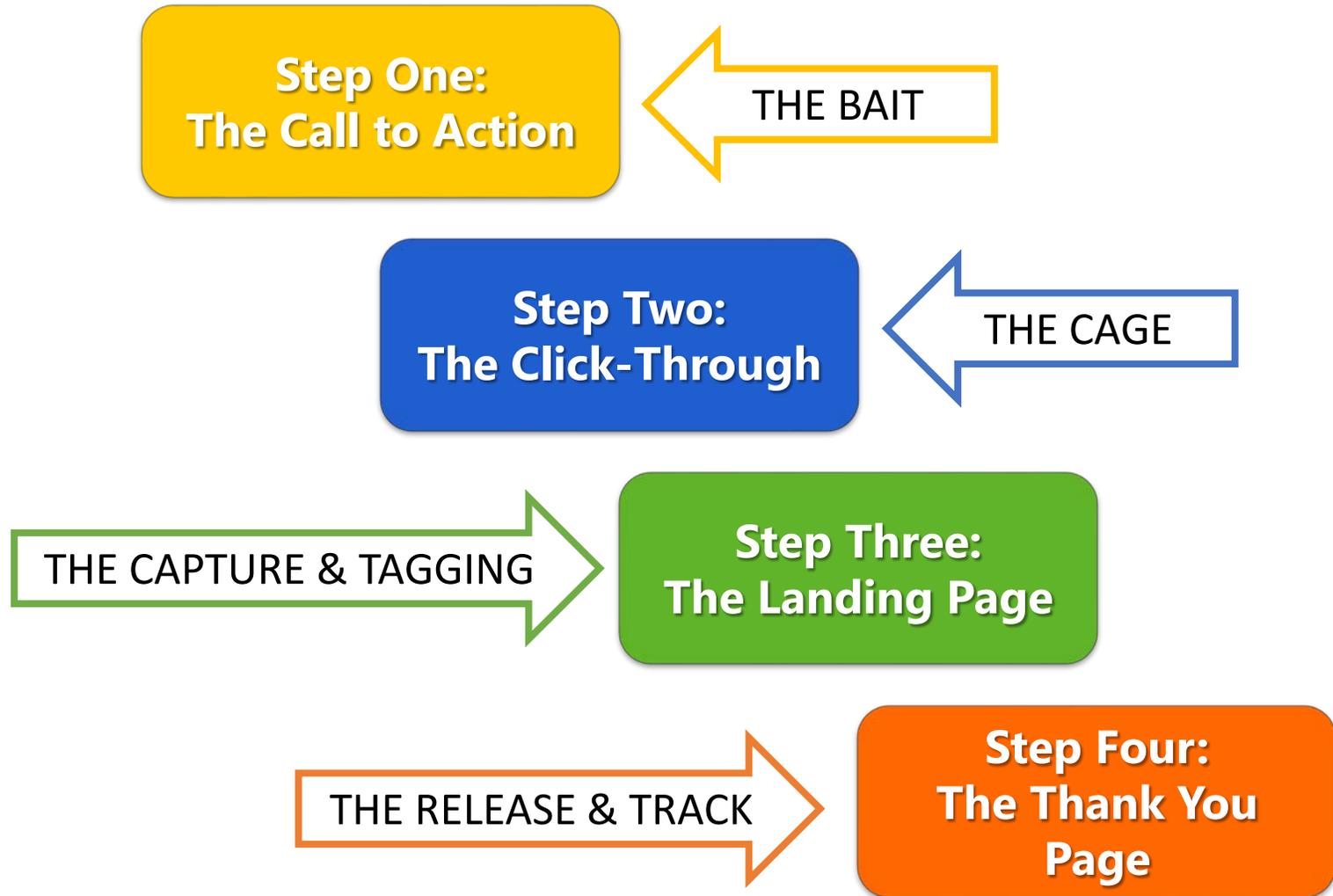


Effective Email Marketing

Tips for Effective Email Marketing:

- Interesting subject line
- Visual elements
- Don't give it all away (info-wise)!
- Mobile friendliness
- Keep it brief
- Clear Call-to-Action

Digital Conversion Path



Digital Conversion Path

Email your followers and pose an offer & CTA: Download my whitepaper, "How to Accelerate Business Value in 90 Day Sprints."

When they click, your database will capture their activity! They are intrigued. Navigate them to your www.AccelerateBizValue.com page.

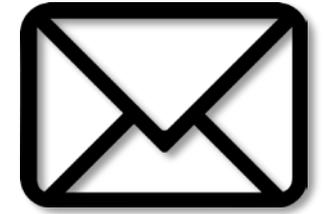
Require the person to fill out a form to get access to the whitepaper. Get their name, company name, title, city, and email address. If they complete it, you KNOW they are interested.

Once they fill out the form, redirect to a Thank You page. And give more options for downloads, webinars, and subscription. Track their behavior!

Building a Digital Sales Funnel



Direct Mail



- Reach a prospect offline
- Send personalized letters and gifts to gain attention and build rapport (Every Family's Business, Walking to Destiny, The Master Plan)
- Target specific contacts and send printed newsletter or quality content

Social Media Marketing



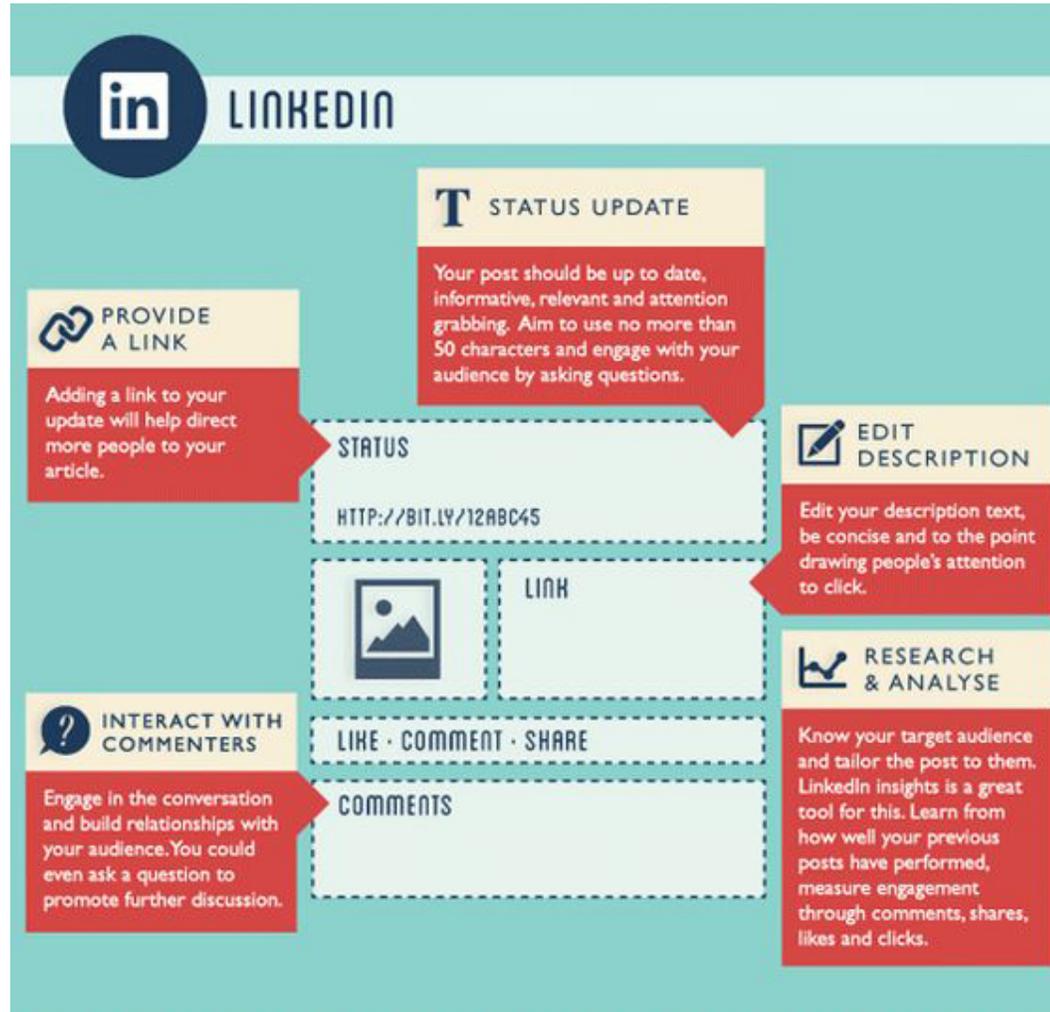
Using social media can drive more attention to your site and help COIs and prospects connect with you and your brand.

Social Tips



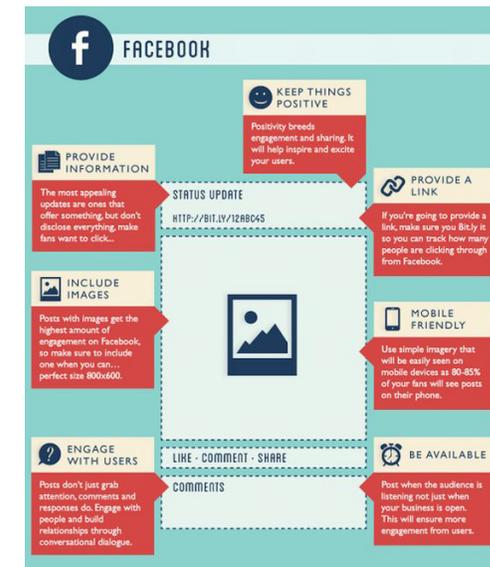
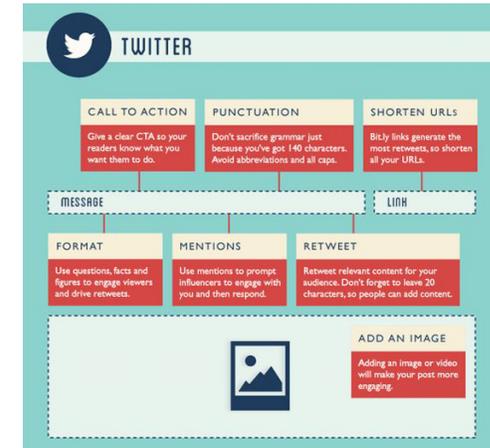
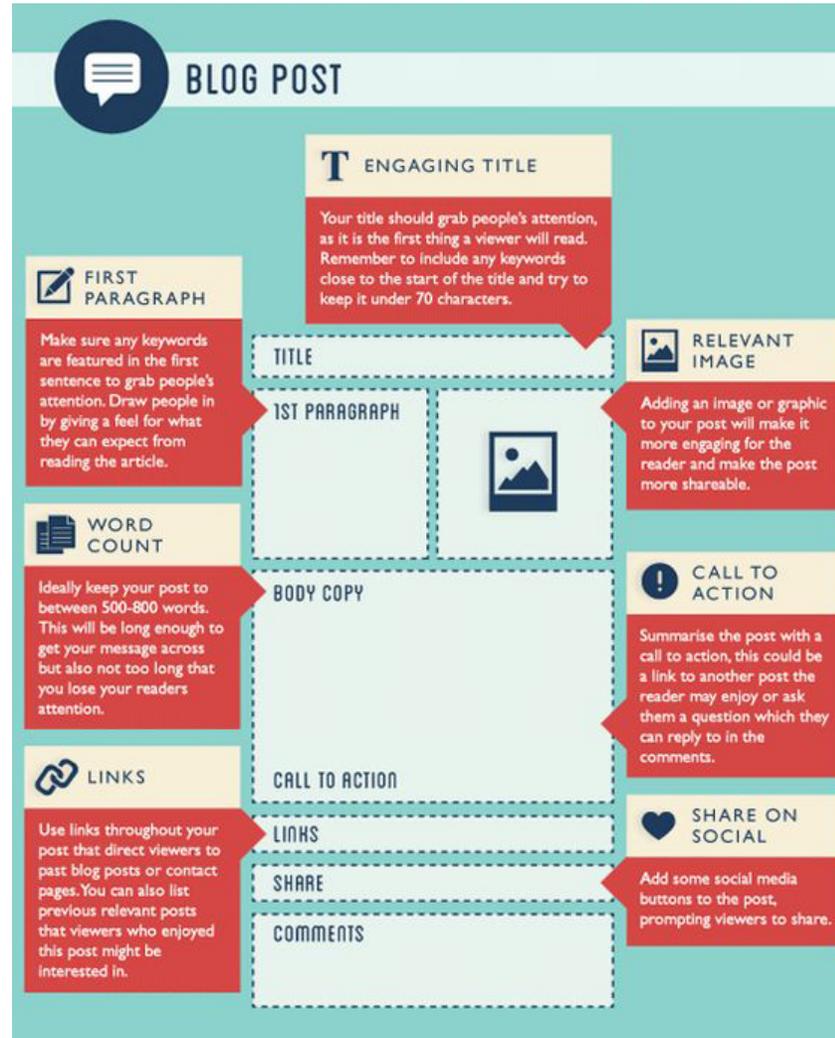
- Post regularly and often
- Respond to comments and queries promptly
- Personalize to build a brand people identify with
- Post with pictures
- Link back to your offer on your site
- Make a calendar you can easily follow

Social Media Marketing



- A great place to connect with CEOs and COIs
- Personalize your invitations
- Optimize your keywords for searching
- Take 20 minutes a day

Social Media Marketing



Building an Editorial Calendar

Get Organized

- Make a manageable plan ([calendar](#))
- Make deadlines and outline posts in advance
- Automate!
- Link back to your site, landing page, offer capture forms
- Measure your efforts ([ROI calculator](#))

COIs & Client Referrals

- Get involved with Chapters
- Ask for referrals from existing clients
- Host Advisor Dinners and Happy Hours
- Reach out to local Economic Department, Chamber of Commerce, and owner groups to establish relationships
- Maintain cross-functional relationships with quality advisors from all specialties



Thought Leadership

It is not simply knowing a lot about something and writing about it. Thought leaders take a position and become a regarded expert and specialist in a specific niche area.

Determine what you are going to build your brand around and focus your outputs on that.



PR & Media



- Submit articles, whitepapers, and events to industry publications
- Reach out to local Economic Department, Chamber of Commerce, and owner groups with whitepapers and speaking opportunities
- Reach out to Financial/Economy/Entrepreneur journalists in your local market

Sponsored Events

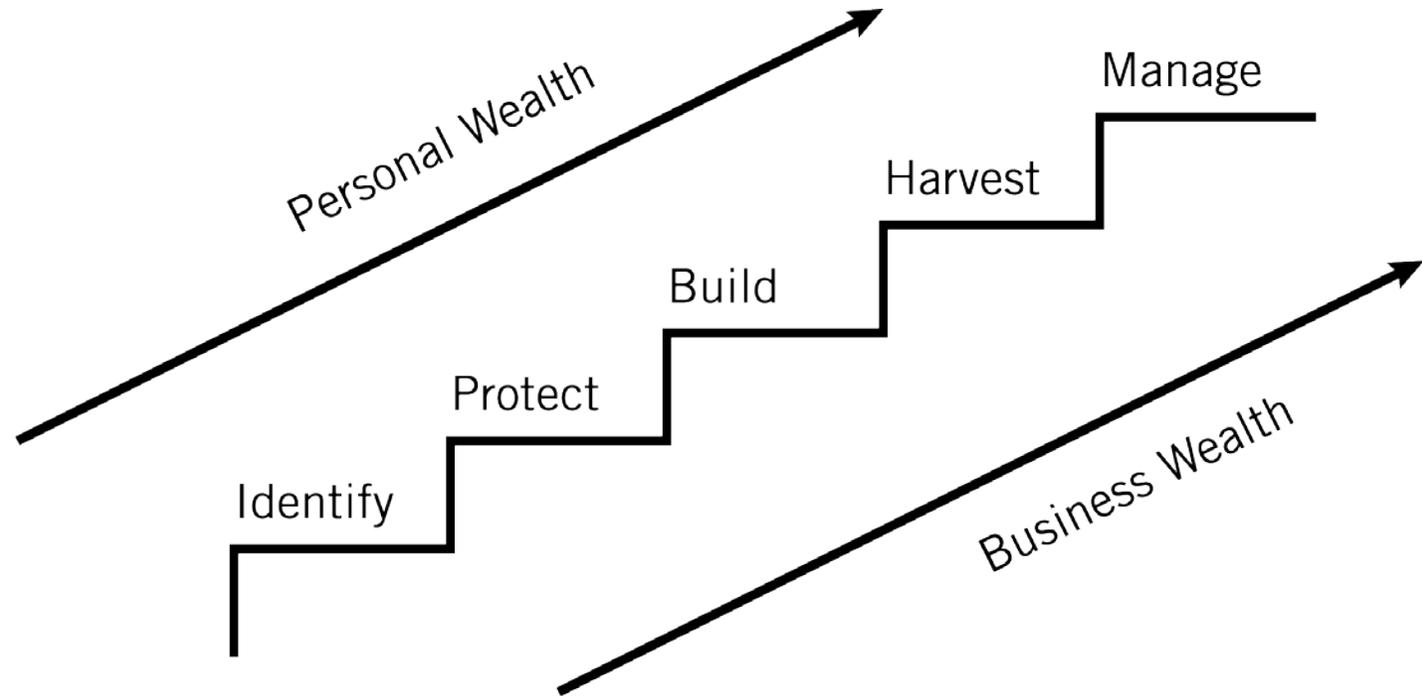


- Sponsor an advisor event to grow visibility and rapport with that referral network
- Sponsor an owner event to get your brand and message directly to your prospective end client
- Sponsor a private course or workshop for clients
- Attend and/or sponsor industry association tradeshow and conferences
- Look for opportunities to sponsor and speak

Sponsored Events

Owner Roundtables

- Five Sessions over Five Months around the Five Stages of Value Maturity



Sponsored
Events

Owners Forums



How to Close

Anticipate MULTIPLE meetings.

Provide a tool for them to benchmark.

Engage in an event.

- Roundtable, happy hour, workshop, etc.

Outline next steps.

Observe & Review

- Be Authentic.
- Educate on concepts.
- Listen. Ask questions.
- Illustrate benefits, metrics, & deliverables.
- Highlight the roles of the team.
- Provide a tool.
- Leave with an invitation.



Next Steps

- **How did you rate yourself?**
- **Next 30 day goals?**
- **Next 90 day goals?**



Final Wrap-up & Questions