

Marketing for the Professional Advisor Masterclass Checklists

Audience & Branding

- ☐ ABCs of Client Alignment & Client Grid
- ☐ BIAS Niche Audience
- ☐ Key Client Profile
- ☐ Understanding of Your Audience's Problems
- ☐ Understanding of How You Solve Their Problems
- ☐ Customer Research Survey, Analysis & Ideas for Implementation
- ☐ SWOT Analysis
- ☐ Values, Vision, Mission, Mission Goals, Mission Strategies
- ☐ Brand Opening One-Liner
- ☐ Brand Voice & Tone
- ☐ Brand Style Guide

Content & Business Development

- ☐ Brand Message, Pillars, Connected Content & Content Ideation
- ☐ Original & Supporting Content
- ☐ Ideal Key Client Journey Map
- ☐ Editorial Calendar
- ☐ Productized Services
- ☐ Lead Generation Tracker
- ☐ Prospect Disqualification Criteria & Process
- ☐ Established Business Development Process
- ☐ Surprise & Delight Campaign
- ☐ Case Studies
- ☐ Testimonials
- ☐ Strategic Partnerships
- ☐ Media Kit
- ☐ Resources for Implementation

Digital Marketing

- ☐ Established Key Performance Indicators (KPIs)
- ☐ Google Analytics Setup & KPI Tracking
- ☐ Google My Business Listing
- ☐ Optimized & Active Social Media Profiles
- ☐ Email Newsletter Template
- ☐ Triggered Email Automations
- ☐ CRM Database
- ☐ Business Automation Operations
- ☐ Resources for Implementation

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