



# 8 SENTENCE MARKETING GUIDE

A marketing guide to  
review every monday  
morning!



**GRANT HICKS, CIM**



**ADVISOR  
PRACTICE  
MANAGEMENT**

 [www.AdvisorPracticeManagement.com](http://www.AdvisorPracticeManagement.com)

## Review every Monday morning



1. Specific purpose of my marketing is to:
2. The competitive advantage we want to stress is:
3. Our ideal client is:
4. Our niche market is:
5. Marketing Strategies we will implement and when: (includes 10 touch communication for ideal clients and prospects)
6. Our ideal client acquisition target is:
7. Our budget will be \_\_\_% of projected gross revenue
8. Our implementation schedule / calendar is for 12 months:



- 1. specific purpose of my marketing is to:

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- 2. The competitive advantage we want to stress is :

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- 3. Our ideal client is: Age 55-75 Financial delegator already paying \$\_\_\_\_\_ Net worth of \_\_\_\_\_ Segment - Wealthy retiree-professional or successful entrepreneur Ideal revenue: \$\_\_\_\_\_

- 4. Our niche market is:

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• **5. Marketing Strategies we will implement and when: (includes 10 touch communication for ideal clients and prospects)**

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**Our 10-touch communication plan will include each year:**

- \_\_\_\_\_ **meetings**
- \_\_\_\_\_ **Calls / online meetings**
- \_\_\_\_\_ **events / webinars**
- \_\_\_\_\_ **client appreciation**
- \_\_\_\_\_ **calls / non -investment communication**
- \_\_\_\_\_ **special emails / newsletters**
- \_\_\_\_\_ **annual feedback meeting / board of directors**
- \_\_\_\_\_ **other**
- \_\_\_\_\_ **Total number of communications to ideal clients**

• **6. Our ideal client acquisition target is : \_\_\_\_\_ new ideal clients in the next 12 months generating \$ \_\_\_\_\_ revenue each for a total target of \$ \_\_\_\_\_ new revenue**

• **7. Our budget will be \_\_\_\_% of projected gross revenue will invest \_\_\_\_\_ (example 3-5% of income) back into growing my business in the next 12 months. This gives us a budget of \$ \_\_\_\_\_ for the next 12 months.**

• **8. Our implementation schedule / calendar is for 12 months: see calendar monthly activities**



# Our Services

## ➤ Do you need help on your ideal client acquisition process?

Download your copy of our "Comprehensive Practice Management Checklist" for Financial Advisors by Grant Hicks CIM

<https://practicemanagement.getresponsepages.com/>



## ➤ Do you want to work on your marketing plan as a financial advisor?

Take our free Ideal client acquisition marketing course for financial advisors  
Your proven marketing strategies course for financial advisors includes : One hour one on one coaching session with Grant Hicks CIM, 8-sentence marketing plan template, 30-page Marketing workbook, Segmentation workbook, Fee audit checklist, Meeting email template, Ebook on Practice Management, proven marketing templates and more...

<https://advisorpracticemanagement.thinkific.com/courses/marketing>



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Content Marketing



Value promise builder



Technology audit



Ideal client experience



9 key process development



Team planning and training



COI Network building



Equity and exit planning



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or set up a complimentary 20 minute call with Grant Hicks CIM  
click the following link <https://my.timetrade.com/book/JMTNJ> and let's talk

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