

A marketing guide to review every monday morning!





GRANT HICKS, CIM





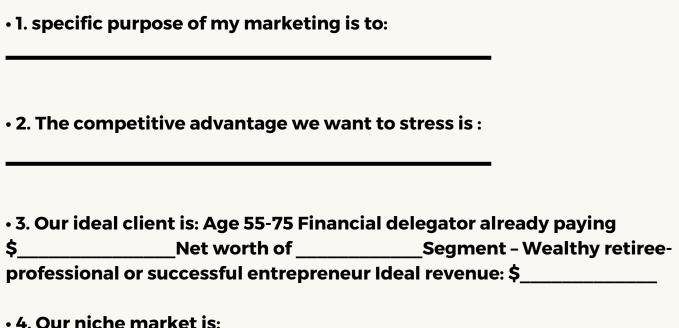
www.AdvisorPracticeManagement.com

Review every Monday morning



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I. S	pecific	purpos	e ot my	marketing	j 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:



 5. Marketing Strategies we will implement and when: (includes 10 touch communication for
ideal clients and prospects)
-
-
-
-
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
ullet 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 revenuel 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.c om/



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.thin kific.com/courses/marketing





Benchmarkeing tools



Branding



Content Marketing



Value promise builder



Technology audit



Ideal client experience



9 key process development



Team planning and training



COI Network building



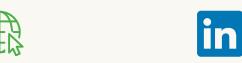
Equity and exit planning



CONTACT US

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ment.com/





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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