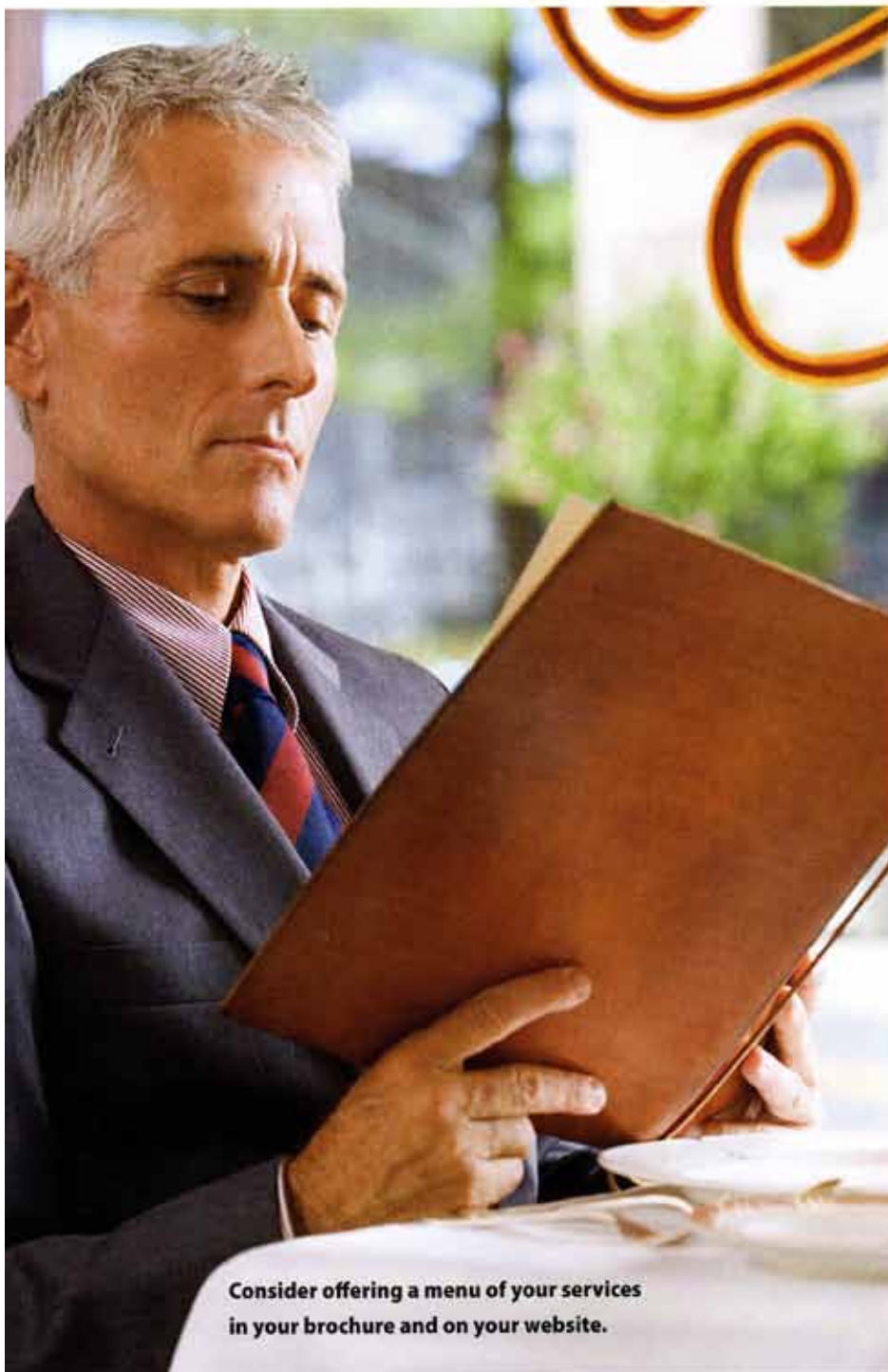


Your marketing machine

Following an eight-step process ensures your calendar is filled with appointments with right-fit clients.

By Karl Hartey



Consider offering a menu of your services in your brochure and on your website.

Marketing is not about earning just one client. Establishing a good low-cost marketing engine will bring a continuous stream of new, qualified prospects that become right-fit clients. Once those clients come onboard, your process will ensure they receive the “wow” experience that will build their loyalty and ensure their referrals.

Step 1: Know your market

Before you can build a marketing system to bring new clients in, you have to know what your ideal client looks like.

I learned at my first Top of the Table Annual Meeting in 1998 that the most successful advisors specialize in one area. I took that advice and have specialized during the last 10 years by becoming an expert in the seminar market.

In my case, my market is retirees, so that is who I invite to my seminars. Your market might be small-business owners, retirees or tax strategies. Whatever your target market is, it's important to identify it. *(Read more about specializing on Page 38.)*

Step 2: Promote your services

Create a menu of your services. If we went into a restaurant and were not presented with a menu after being seated, we would feel some-

PEOPLE WANT TO KNOW MORE ABOUT YOU AND THE PRODUCTS AND SERVICES YOU PROVIDE.

what strange. So why is it that so many financial professionals do not have a menu of their services? Your clients need to understand exactly what you do and how much you charge for it. Once you have created the menu, include it in your promotional brochure and on your website. Display the menu in the reception area of your office. Include the menu with your review letter.

Step 3: Produce a welcome pack

When you meet with a new client, walk them through the client journey of how they will be treated. Explain to the client how many meetings you will have, what type of information is expected of them and what time frame is involved.

Step 4: Develop a referral system

Do you have a system for asking existing clients to refer others to you? Somewhere within the information you give clients, include a sentence like this: "The bulk of our business comes through personal recommendations. If we do a good job, we would be very happy for you to refer us to others."

When you meet a new client, let them know that new business comes through personal recommendations. Explain that you promise a client certain things, and if you do a good job, you would like to be referred to others.

Step 5: Create a web presence

Your website is a mechanism used to inform people about you. When a prospective client visits your site, you want them to be able to find out about your practice. Make sure it includes the following information:

- About us
- Team profile
- Mission statement
- Description of services
- Menu of services and associated fees
- Client testimonials
- Frequently asked questions
- Free newsletter (monthly or quarterly)
- Contact details

We have noticed that when we send out our seminar invitations, the number of hits on our website increases significantly. In our case, just after a seminar mailing, we see a huge increase of people visiting our website between 10 and 11 the following Wednesday morning.

Step 6: Networking

Networking is a great way to meet people. To do this, you need to get out into the professional world, give as many people as you can your referral card and deliver an effective elevator speech. An elevator speech is a 20-second description of what you do, adapted to your own personal style, that attracts people to want to know more

about you and the products and services you provide.

Step 7: Public speaking

Public speaking is a very effective way of filling your calendar. Make sure you introduce a system that allows those at your talks to contact you, be added to your database and subscribe to your newsletter. All you need to do is develop a portfolio, which includes a résumé, photograph, titles of presentations you can offer and a biography. This can be emailed out to the head offices of each of the various speaking groups, and over a period of time, you will find that you will be able to get bookings very quickly.

Step 8: Public relations

I write a series of articles every month for the local newspapers/magazines within my area. I get between 300 and 600 words to write about and promote our services. If you make contact with the editors and ask what they are looking for, it can provide you a great opportunity. Ours works as a question-and-answer session where I will write a short article on a topic, then answer frequently asked questions.

These eight steps work for me, but they might not all work for you. I hope that from the ideas above you will be able to pick up at least one idea and to maximize your growth opportunities going forward. ■