401(k)Marketing

100 POINTS OF MARKETING

Your custom action plan to earn your ***PhD in marketing***

INTERACTIVE WORKBOOK EXPERIENCE

PREP COURSE

1 LET'S FIND OUT WHERE ARE YOU TODAY, SO WE KNOW WHERE YOU CAN GO TOMORROW.

FILL OUT THE QUESTIONS AND TALLY YOUR SCORE.

	YES (1 POINT)	NO (0 POINTS)
Does your firm have a website?		
Do you have a LinkedIn profile?		
Does your firm have a company office?		

SCORE

2 WHAT TYPES OF MARKETING CONTENT DOES YOUR FIRM HAVE?

	YES (1 POINT)	NO (0 POINTS)
Business cards		
Letterhead		
Folder		
Firm brochure		
Statement of services		
Proposal presentation		

SCORE

3 WHAT ARE SOME OF THE WAYS A PROSPECT COULD BE INTRODUCED TO YOU?

	YES (1 POINT)	NO (0 POINTS)
LinkedIn		
Client referrals		
Center of influence relationships		
Email communication		
Blog articles		
Client appreciation events		
Cold calling		
Company signage		
Direct mail		
Newsletters		

SCORE

PREP COURSE

TALLY YOUR SCORE

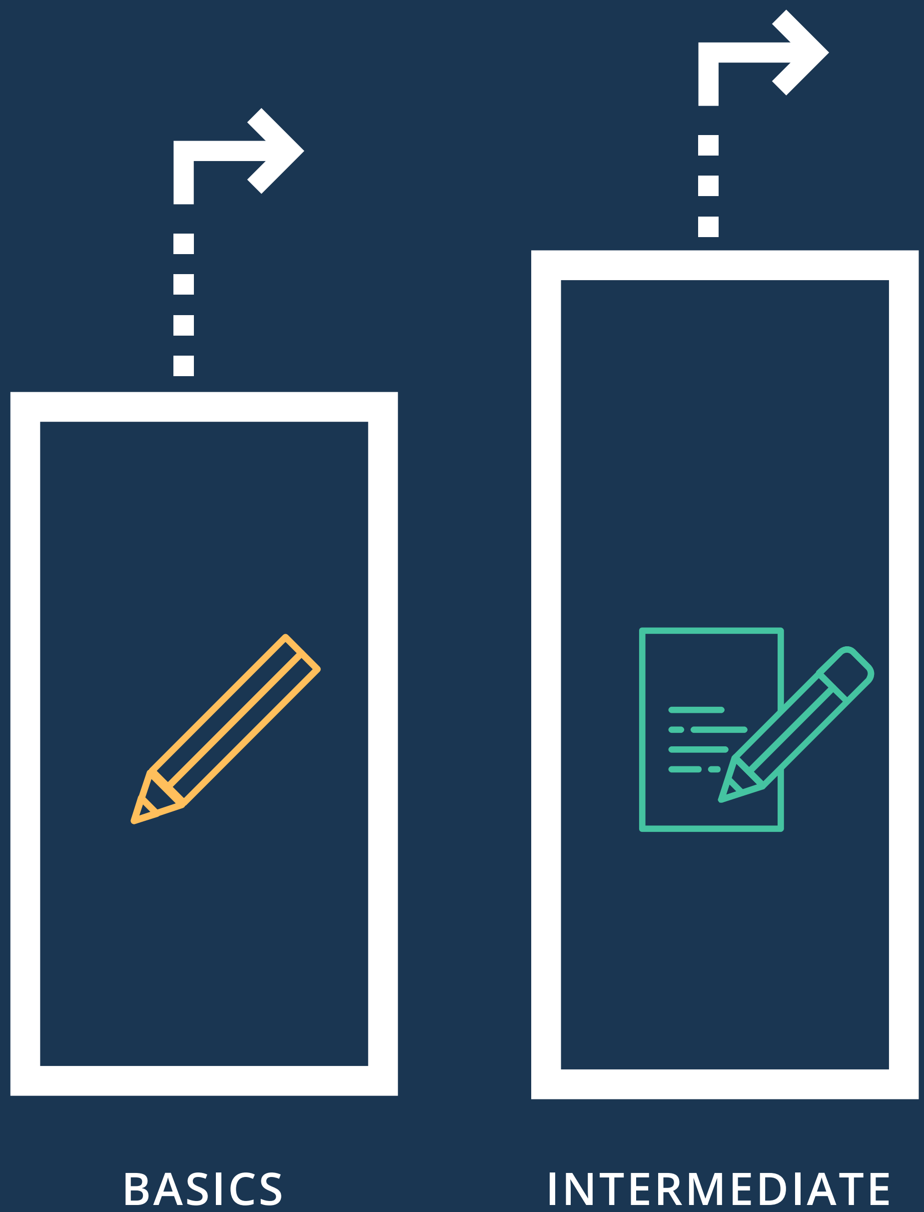
1 2 3

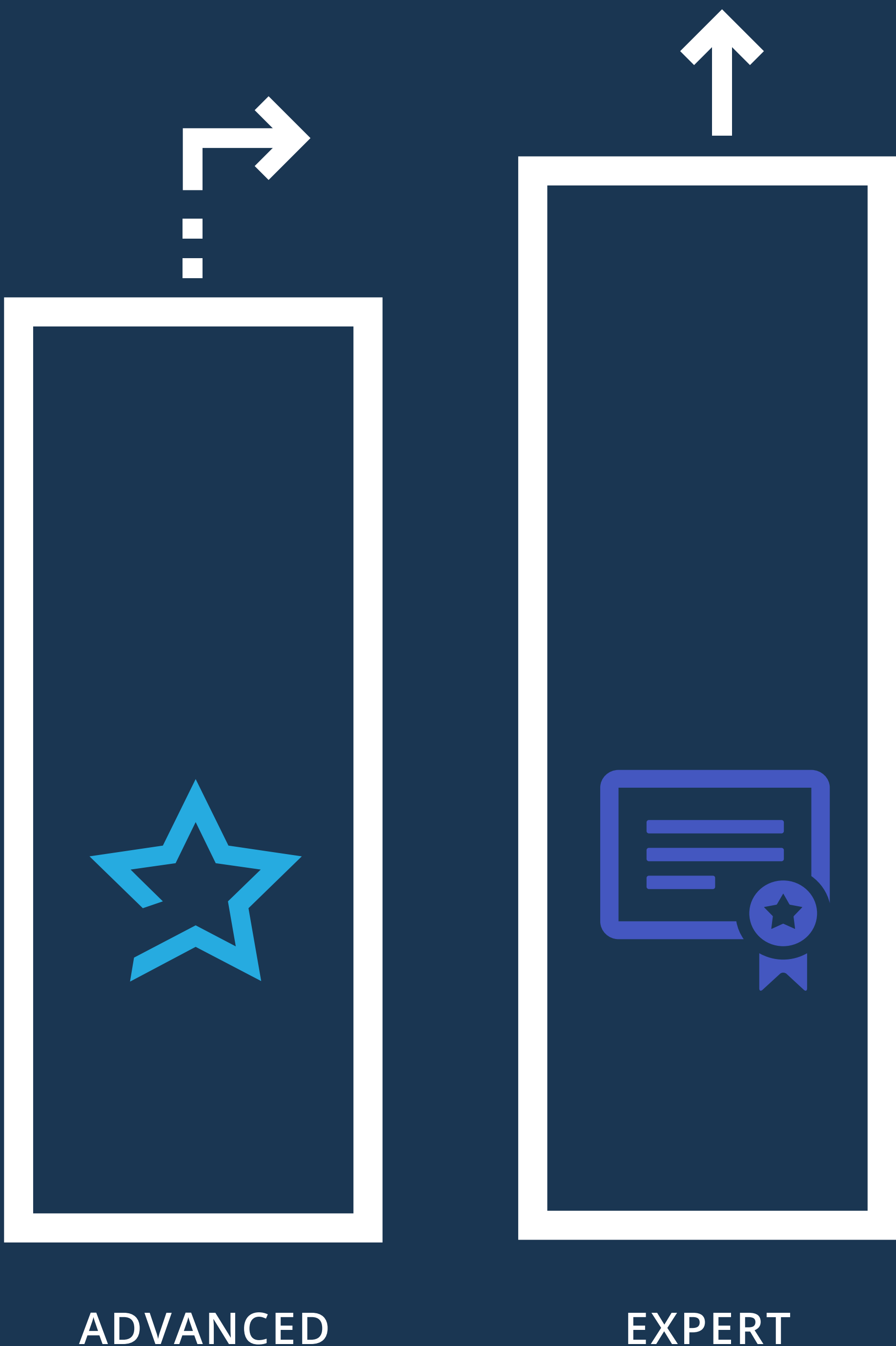
SCORE

PREP
SCORE:

During today's session, we will walk through **100 Points of Marketing**. The goal is to help you increase your trusted TPA brand, build more community awareness, and ultimately help you gain more retirement plan clients.

There are four sections:





At the end, we will tally up your score to learn how you can enhance your marketing authority. Also, you will find at the end of the workbook, a Pro Tips section with ideas to strengthen your professional brand.

BASICS

1 HOW DOES YOUR WEBSITE COMPARE?

NEEDS IMPROVEMENT (1 POINTS)

GOOD (5 POINTS)

EXCELLENT (10 POINTS)

SCORE

2

HI, MY NAME IS...

Write it here.

BONUS!
5 POINTS

HOW DOES IT COMPARE?

	YES (5 POINTS)	**NO** (0 POINTS)
Is this the name on your ASPPA badge?		
Is this the name on your LinkedIn profile?		

SCORE

3

DOES YOUR LINKEDIN PROFILE INCLUDE?

	YES (1 POINT)	**NO** (0 POINTS)
Banner Image		
Professional headshot *(taken within the last 3 years)*		
500+ connections		

SCORE

BASICS

TALLY YOUR SCORE

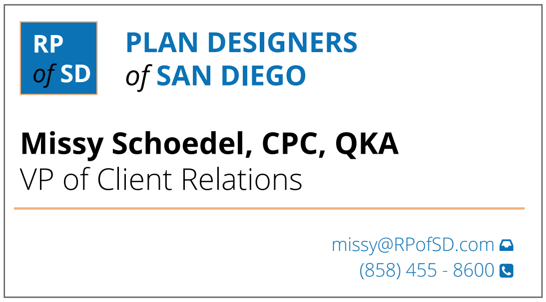
1 **2** **3**

SCORE

BASICS
SCORE:

INTERMEDIATE

1 HOW DOES YOUR BUSINESS CARD COMPARE?



NEEDS IMPROVEMENT (1 POINTS)

GOOD (3 POINTS)

EXCELLENT (5 POINTS)

SCORE

2 WHAT MARKETING CONTENT DOES YOUR FIRM USE TODAY?

	YES (1 POINT)	NO (0 POINTS)
Firm Brochure		
Service Calendar		
Proposal Presentation		
Branded Folder		

SCORE

3 HOW CONFIDENT ARE YOU THAT PAM CAN ACCURATELY REPRESENT YOUR FIRM DURING THE DECEMBER RETIREMENT PLAN COMMITTEE MEETING?

NOT VERY (1 POINTS)

ADEQUATE (3 POINTS)

EXTREMELY CONFIDENT (5 POINTS)

SCORE

INTERMEDIATE

TALLY YOUR SCORE

1 2 3

SCORE

INTERMEDIATE **SCORE:**

ADVANCED

> "No matter how great the talent or efforts, **some things just take time.** You can't produce a baby in one month by getting nine women pregnant."
>
> — Warren Buffett

1 HOW MANY CONTACTS DO YOU HAVE IN YOUR CRM?

1000+ (15 points)
999 – 500 (10 points)
499 - 100 (5 points)
99 – 1 (2 points)

SCORE

2 DESCRIBE THE ACCURATENESS OF YOUR CRM.

100%, confident in our data (5 point)
75%, semi-confident in our data (3 points)
50%, it's a hodgepodge of lists over time (1 point)
25%, it's all over the place

SCORE

3 SELECT ALL THE WAYS YOU STAY IN FRONT OF PROSPECTS

	YES (1 POINT)	NO (0 POINTS)
Phone calls		
Email campaigns		
Social media		
Webinars		
Seminars/Events		
Blogs		
Newsletters		
Digital ads		
Press releases		
Videos		

SCORE

ADVANCED

TALLY YOUR SCORE

1 2 3

SCORE

ADVANCED **SCORE:**

EXPERT

	YES (1 POINT)	NO (0 POINTS)
BONUS POINTS		
DO YOU WRITE A BLOG?	____	____
HOW MANY WAYS DO YOU SHARE AND PROMOTE YOUR BLOG?		
Email campaigns	____	____
Social media	____	____
Magazines	____	____
Newsletters	____	____
Videos	____	____
DOES YOUR FIRM USE AN EMAIL AUTOMATION PROGRAM?	____	____
DOES YOUR FIRM USE GOOGLE ADWORDS?	____	____

SCORE

TALLY YOUR SCORE

EXPERT
SCORE:

IT'S TIME TO TALLY UP YOUR SCORES!

ADD UP YOUR SCORE

PREP COURSE ______

BASICS ______

INTERMEDIATE ______

ADVANCED ______

EXPERT ______

TOTAL SCORE

POINTS:
100-80

Marketing PhD

Look at you – you are a marketing Allstar! Great work and keep it up. Check out the Pro Tips in the next section to enhance your already stellar marketing!

POINTS:
79-40

Varsity Sports

Good work! With a few tweaks here and there, you'll be in college soon enough. Check out the workbook questions that you could have scored higher – circle them. Then check out the next section with Pro Tips and focus on boosting your initiatives into Ivy League success. Keep it up.

POINTS:
39-0

Novice – and that's okay.

Marketing is hard. But you already took the first step – this workbook. So, great work there! High five to you. To help you get started, check out the Pro Tips. Then, pick three questions from this workbook and focus on acing them. That'll put you on the way towards marketing success.

PRO TIPS AND MARKETING IDEAS

High five! You're on your way to marketing success. Below are some helpful tips to help you increase your marketing authority within your community. Use these ideas to improve your retirement plan expert authority and, of course, gain more retirement plan clients.

WEBSITE

Plan sponsors are smart and addicted to Google. Over 86% of modern consumers are going to research before they make a purchase. The same holds true for plan sponsors. Oftentimes, your website is the first place they visit to learn more. Why not make a great impression?

PRO TIP:

Ask 5 trusted professionals for feedback on your website. Then work to update, revise, and/re-do your site to WOW visitors.

AUTHORITY AND INFLUENCE

Think of all the ways your advisor and plan sponsor prospects can find you – such as on the Internet, through a newsletter, on a webinar, via a voicemail, and on and on. Take a moment to review the list, compare it to the items in Question 2. We challenge you to identify and implement ONE NEW WAY that prospects could potentially meet you. Be bold. The takeaway is that the more places a plan sponsor can find you, meet you, and get to know you, the more “at bats” your firm will receive.

PRO TIP:

Every 6 months, conduct an audit of your brand by Googling your name, your company name, and all team members. With each new marketing campaign, take note of how your authority and influence increases.

MARKETING CALENDAR

A marketing calendar is a roadmap that keeps your marketing on track. It helps you stay organized and focused through all business cycles. Below is a sample quarterly calendar.

PRO TIP:

If you are new to marketing, start small. For example, post a monthly blog. Then work your way up from there. For a digital sample, check out www.401k-marketing.com/marketing-calendar for a complimentary version.

CONTENT TYPE	TITLE	POST DATE	WHERE DO I POST?				
			LINKEDIN	WEBSITE	EMAIL MARKETING	DIRECT MAIL	PHONE CALL
Blog Articles	Benchmarking Your Plan	Thursday, March 1, 2018	X	X			
Blog Articles	Motivating Savings	Sunday, April 1, 2018	X	X			
Blog Articles	Annual Plan Review	Tuesday, May 1, 2018	X	X			
Direct Mailers	Who Wants to Retire v1	Thursday, April 26, 2018	X	X		X	
Direct Mailers	Who Wants to Retire v2	Saturday, May 26, 2018	X	X		X	
Email Templates	Lift Newsletter	Wednesday, February 21, 2018			X		
Email Templates	Infographic: Plan Sponsor "Plan Questionnaire"	Wednesday, February 7, 2018			X		
Email Templates	Infographic: Participant "How Much Should I Save?"	Wednesday, March 7, 2018			X		
Email Templates	Blog Article: Benchmarking Your Plan	Monday, March 5, 2018			X		
Email Templates	Blog Article: Motivating Savings	Tuesday, April 3, 2018			X		
Email Templates	Blog Article: Annual Plan Review	Friday, May 4, 2018			X		
Infographics	Plan Sponsor: "Plan Questionnaire"	Tuesday, February 6, 2018	X	X			
Infographics	Participant "How Much Should I Save?"	Tuesday, March 6, 2018	X	X			
Newsletter	LIFT Newsletter	Tuesday, February 20, 2018		X			
Video	Repeatable Fiduciary Process	Tuesday, March 13, 2018	X	X			
Weekly Social Media	TBD	Daily: Monday-Friday	X				

LINKEDIN PROFILE

When you receive a referral to a plan sponsor prospect, what is the first thing you do? Most TPAs would say, "I Google them." Right? We all do that. Therefore, when a prospect is Googling you, you want your results to be strong; and LinkedIn is one of the most powerful professional search engines in the world. LinkedIn provides a trusted platform for prospects to easily find you, research your background, confirm credibility, view your common connections, and digitally open a social dialogue.

PRO TIP:

What is your name? ________________________ (write it here.) Now, is that the name listed on LinkedIn? Some people have "formal" and "normal" names. You want your social media name to be your "normal" name. It is the name a client or center of influence would use when describing you. The reason is that the prospect is going to look you up based on your "normal" name. So, if your name is Michael, but everyone knows you as Mike, then update your profile to read "Mike" instead of Michael. At the end of the day, computers are just connecting numbers and letters, so the easier it is for algorithms to connect, the easier it is for the digital world to find you – the accurate you.

CRM CONTACTS

The more contacts in your CRM, the more opportunities you will have to promote your retirement plan expertise. We recommend a list of 500+ contacts.

PRO TIP:

Need help? Here a few ways to get started:

Contact an internal wholesaler and ask them to run a plan search report. Identify any known contacts.

Update your website with a Call to Action (CTA), such as "Subscribe to our newsletter" to build your email database.

Download your LinkedIn contacts and upload them into your CRM. How-to Link

CRM ACCURATENESS

Garbage in; garbage out. You want clean and accurate data.

PRO TIP:

At the beginning of each year, download all your contacts. See if there are any holes in the information. Then task a team member to track down these missing data points.

ANNUAL TOUCHPOINTS

Don't be out of sight, out of mind. The more times you are in front of your clients, prospects, and centers of influence, the more they will know you. Strive for regular and consistent touches with your contact list.

PRO TIP:

Segment your contacts into three lists (Clients, Prospects, and Centers of Influence). Create a marketing calendar for each segment. Include value-add content and calls to action to increase open rates, clicks and replies. Some examples include emailing your monthly blog, webinar invitations, video hyperlinks and award announcements.

PHYSICAL MARKETING MATERIALS

When you sit down with a prospect for the first time, what material do you bring? How do these materials enhance the conversation? If you left the room, would your content explain your plan design analysis process, describe employee education, and/or represent the professionalism of your firm? If it does, awesome – great work! If not, then let's change that. Your marketing materials should be an extension of your firm, and they should be just as professional as you are.

PRO TIP:

Conduct a brand audit. Objectively look at your materials as if you were a new prospect. Then ask a trusted professional to view your materials and provide honest feedback. Let's make your brand beautiful.

CONFIDENCE

Wherever you are – that's okay. Marketing takes time. It's the little things over time that create consistency, and consistency creates trust. Then, that trust creates a long-lasting brand. With every marketing touchpoint and campaign, you are building your professional retirement plan authority.

PRO TIP:

***Keep it up** – with each new plan and your skilled guidance, know that you are helping hardworking people achieve their American Retirement Dream.*

Whether you are a Marketing PhD or a novice, remember that marketing doesn't always work in a straight line. Keep at it and over time, you will become known as your community's "go-to" retirement plan expert.

Hope you enjoyed this special session and Happy Marketing!

CONGRATULATIONS

YOU ARE A MARKETING **ALL-STAR!**

100 POINTS OF **MARKETING**

*Your custom action plan to earn your **PhD in Marketing**. Great work, you are on your way to marketing success!*

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We believe in transparency. At 401(k) Marketing, we will work with you through each step of the writing, design, and creative process. We understand that you are not writers–you are professional retirement plan advisors! This is why we strive to write 95% of the copy on your behalf–in your natural voice. We take the time to learn your "ism," because marketing should feel natural...it should feel like you.

Also, **we love design!** Our designers are the best in the world. Gone are the days of old people and bicycles–no thank you! Let's bring fresh marketing ideas and imagery to the retirement plan industry. It's okay to make changes and be bold. That's how you get noticed.

You are your brand, so make it exciting! It is the unique value that you convey to your clients, prospects, and the entire community. As retirement plan professionals, we partner with you to listen and understand the company goals that underlie your brand. We want you to show the world your gorgeously-designed content that promotes your true image. At 401(k) Marketing, we are the experts who will work with you to develop high-quality, well-written, and engaging content that elevates your firm to the top level of retirement plan professionals.

Our clients are the best in the business. We are so honored and proud to share their industry accomplishments.

The retirement plan space takes decades to learn, understand, and eventually to impact. Our clients include award winning advisory teams from across the country and they are improving retirement for millions of Americans. Thank you for all that you do!

We are excited to begin working with you!

THANK YOU!