

Build Your Simple, Smart Marketing Plan

What are you doing to grow your business?

Use this resource to help you organize your strategy, campaigns, and activities into your own simple, smart marketing plan.



What's inside:



List of marketing and value-building activities



Worksheet to build your
simple, smart marketing plan



Marketing and value-building activities

While these activities may vary in how directly, or indirectly, they relate to obtaining new clients, they are focused on helping you build a strong brand, show your value and identify the target clients you want to attract. Ultimately, the marketing strategies and activities you choose should align with your firm goals and your vision of the firm you want to build.

Firm attributes


The qualities of your firm can reinforce your reputation and image, either attracting target clients who find your firm’s image appealing or deterring those whose expectations are not aligned with your firm’s offering. Your collateral reinforces your marketing efforts by showcasing your firm and brand in a consistent and professional way, and makes it easy for clients to share materials and recommend you to others.

Collateral

- Marketing plan
- Communication schedule
- Brochures
- Letterhead
- Business cards
- Case studies
- Postcards
- Office or building sign
- Other stationary
- Branded swag (pens, mugs, pads)

Firm Qualities and Attributes

- Consistent messaging
- Clear brand identity
- Brand positioning and value statement
- Firm name
- Location
- Operating hours
- Payment options
- Social demeanor
- Office culture
- Dedicated time with clients
- Follow through
- Easy to do business with
- Reputation



Download the marketing calendar



Firm services

The services and touchpoints you offer, and how you offer them, show target clients the specific ways your firm can meet their unique needs. Personal gestures, appreciation events, and communications can resonate and create an elevated experience that your clients will remember and want to talk about with others. These types of personalized experiences give you additional ways to reinforce your value and convey your brand. For example, if you are a family-friendly firm, sending a card when a client has a baby or hosting a summer picnic for the whole family reinforces your firm's image to your current clients, who may be able to refer new clients to you.

Services / Offerings

- Overall benefits / list of services
- Strategic relationships
- Coupons
- Free trial offers
- Contests and sweepstakes
- Free demonstrations
- Free consultations

Personal Touchpoints

- Birthday calls, emails, gifts
- Holiday cards or gifts
- Wedding anniversary or other life event
- Anniversary of milestone recognition
- Donations to charities

Appreciation Events

- Fireside chats
- Picnics / BBQs
- Movie night
- Sporting event
- Cooking class
- Meals
- Charity events
- Musical performance
- Art gallery event
- Wine tasting
- Spa day
- Hobby/leisure workshop or event
- Shredding party



Credibility

Look for opportunities to grow your reputation as a potential expert in certain areas. Building your credibility through articles, speaking opportunities, and educational events can showcase your knowledge and expertise, and further highlight how you and your firm can address the unique needs of your target clients.

Educational topics to lend your expertise

- Tax planning
- REITs
- Will / estate / trust planning
- Long term and elder care
- Retirement planning, Social Security, Medicare, health insurance
- Legacy planning
- Education planning
- Insurance planning
- Income and budgeting
- How to read financial statements
- Intro to the markets
- Selling a home / mortgages
- Alternative investments
- Socially responsible investing
- Market insights and current events
- Identity theft
- How to use technology
- How to organize documents

Activities that help build credibility

- Whitepapers
- Research studies
- Featured articles
- Quotes in articles
- Op-eds
- Speaking events
- Infomercials
- Public service announcements
- Book
- Seminars
- Newsletters/commentary
- Specialized field expertise
- Attendance at trade shows
- Event MC or host
- Charitable associations
- Corporate associations
- Firm open house

Advertising

There are many ways to advertise what you do, and the medium you choose (web, print, media) will depend on who you're trying to reach, the goals you have for your marketing campaign, and your overall image as a firm. In the web category, we've also outlined strategies to use for tracking or driving web traffic as part of your advertising efforts.



Web

- Website with custom domain
- Social media
- Blog or contributed articles
- Email campaigns
- Podcasts
- Video or audio messages

Implement SEO strategies to help drive traffic and track activity:

- Personalized domain
- Keywords
- Google ad words or analytics
- RSS feed
- Pay-per-click ads
- Sponsored links
- Reciprocal links, banners, or joint ventures with other sites or firms

Print

- Direct mail
- Print ads (newspaper, magazine, flyers)
- Bumper stickers, window clings
- Posters, billboards, and other signage

Check with your community and local business association for more opportunities to place ads and promote your business.

Media

- Commercials (TV, streaming services, radio, local theaters)
- Radio or TV show appearance



Build your simple, smart marketing plan

Use this form to plan and organize your strategy, campaigns, and corresponding activities to build and implement your simple, smart marketing plan.

Initiatives / Strategy

Structure your marketing plan to drive business goals. **Example:** Grow firm assets by \$5 million in first six months of 20XX.

1. _____
2. _____
3. _____

Campaign

Once you've defined the strategy, you can design the marketing campaigns that will determine the activities needed to support your strategy. **Example:** Convert commission-based clients.

1. _____
2. _____
3. _____

Corresponding Activities

List the detailed activity that will support your strategy and campaign (i.e., what, when, how, and why)

Example: Identify commission-based clients and create a drip campaign beginning January 1, 20XX.

1. _____
2. _____
3. _____

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100896 | M20-100233 | 08/2020 | EXP 08/31/23