

Creating a Simple, Smart Marketing Plan



Most people consider marketing to be focused on identifying prospects, but if you want to grow exponentially you have to consider marketing that focuses not only on your prospects, but your current clients, centers of influence and even your brand and reputation in your community. It is important to grow in different areas, not just generate a single new client. When effectively designed, marketing will:

- Increase client satisfaction
- Drive referrals
- Promote brand visibility
- Connect you with the right audience
- Grow revenue

GETTING STARTED

Creating a marketing plan can seem like a large task, we have outlined a few general items to keep in mind as you begin.



Keep It Simple

Many advisors simply attempt to do too much, ultimately overcomplicating the process and overwhelming themselves.



Do Your Research

There is not one right way to structure a marketing plan. Knowing all your available options before getting started will help you to maximize the effectiveness of your plan.



Establish Goals

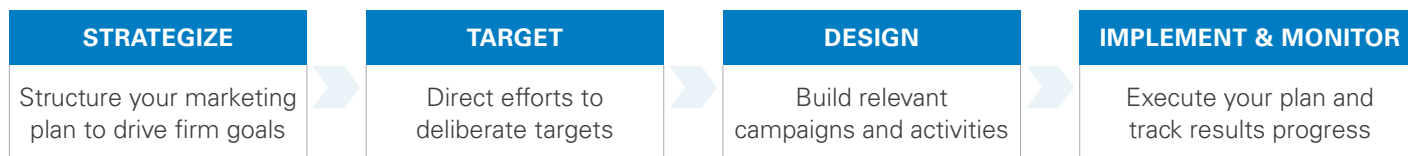
In other words, know what you would like to accomplish. Whether it's raising brand awareness, attracting a specific type of client, or something entirely different, knowing the end goal will help you build a successful marketing plan.



Implement and Repeat

Implementing a marketing plan takes time and resources.

KEY COMPONENTS OF AN EFFECTIVE MARKING PLAN



EXAMPLE MARKETING CAMPAIGNS

Strategy

- Improve brand recognition in the community with our ideal clients.
- Grow our developing doctor niche (increase from 5% of clients to 15%)
- Improve share of wallet by 10% for all clients and increase quality referrals

	CAMPAIGN 1	CAMPAIGN 2	CAMPAIGN 3
Overview	Community Credibility	Grow Doctor Niche	SOW / Referrals
Objective	Establish expert reputation in our community	Obtain 5 new retiring doctor clients per year	Improve SOW by 10% Generate 6 A or B referrals per year.
Target	Community activities that A / B clients are involved in	Doctors nearing retirement	Current A & B clients

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