



ESTD 2016

# PERFECTLY planned content

## COACHING

Are you ready to level up your advisor marketing? Our coaching and consulting programs are designed to help you knock out your goals and achieve actual results. Ready to get started?

### PROBLEM SOLVING HOUR

In this one-hour session, we're going to help you answer one specific marketing dilemma you're currently facing. Whether you want to set up a blog, define your target audience, start leveraging social media, or maximize your email marketing - let's tackle it together!

#### WHAT YOU'LL GET:

- 1-hour session
- Follow up actionable to-do list reviewing our call
- List of resources, or any other tools that will help you get the results you need - fast!

**\$250.00**

# LAUNCH YOUR MARKETING STRATEGY

**This 3-month coaching program is designed for advisors who are in the process of launching their firm, or who have recently launched - but don't have a marketing strategy in place yet. Our goal with this program is to help you build a comprehensive marketing program for your business that leverages content creation, email marketing, social media, and more.**

## **WHAT YOU'LL GET:**

- Two 1-hour coaching sessions/month
- Each session has a defined goal, including:
  - Creating a client avatar
  - Building a website that attracts prospects
  - Generating and nurturing leads
  - Creating content
  - Promoting your brand
  - And tracking your results!
- Follow up actionable to-do lists after each session
- Ongoing support for finding tools and resources to help facilitate your success
- Unlimited email access during our 3-month engagement

**\$600/Month for 3 Months**

# MARKETING STRATEGY AUDIT

**Are you stuck in a rut when it comes to marketing your practice? Are you ready to level up your content, and engage in the digital world of prospecting - but aren't sure where to start? This program is ideal for established advisors, or advisor teams, who are ready to take a closer look at their marketing strategy and improve their results. Marketing is just like anything else in your business - your strategy needs to grow and change over time! This 3-month program is specifically designed to help audit your current strategy, and set new goals and processes based on what's working (and what's not).**

## **WHAT YOU'LL GET:**

- Two 1-hour coaching sessions/month
- Each session has a defined goal, including:
  - Auditing your current strategy and brand, and walking you through how to leverage analytics to grow and improve
  - Creating a content creation plan that's scalable, and helps to showcase your voice
  - Developing a brand guide to use across all content channels and marketing outlets
  - Building a plan for lead generation and effective lead nurture
  - Determining how to best use social media based on your growth goals, and where your current engagement exists
  - Creating a custom, 12-month marketing calendar for you and your team to follow
- Follow up actionable to-do lists after each session
- Ongoing support for finding tools and resources to help facilitate your success
- Unlimited email access during our 3-month engagement

**\$600/Month for 3 Months**

