

# COMPREHENSIVE 12-MONTH marketing strategy on-site visit



Thank you for requesting more information about Perfectly Planned Content's Marketing On-Site Visit!

Our traditional visit includes a 12 month strategy plan that's perfect to help new financial planning firms and more seasoned practices organize ideas, define a target audience, and get started creating content and generating leads!

The on-site visit includes three days with Zoë Meggert and team members (if applicable), as well as several meetings ahead of the visit itself to start developing your custom marketing strategy and playbook.

## **The materials and marketing assistance delivered during the visit include:**

- 12-month evergreen blog content calendar with notes to help get you started writing!
- Best practice guide for blogging
- One lead magnet w/email follow-up sequence (written, designed, and implemented on your site!)
- Social media posting schedule
- Social media best practice guide
- Social media channel audit
- Cost comparison for social scheduling tools
- Web copy audit
- Email marketing software comparison
- Customized best practice guide for your firm's marketing (or your "Marketing Playbook")

## **Total Investment: \$5000\***

\*this does not include cost of travel or expenses, which will be billed for after the on-site visit and will not exceed \$2000