

# Owner Engagement Strategies for the Professional Advisor



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**Which  
Box Best  
Describes  
You?**



# Critical Areas for Integrated Marketing

- 
- Primary Objective(s)
  - Competition
  - Risks
  - Internal Messaging
  - 90-day goals / milestones
  - 180-day goals / milestones
  - Budget
  - Other resources required
  - Tools
  - Addressable Market(s)
  - Branding Strategy
  - External Messaging
  - Marketing Strategy
  - Marketing Tactics

# Buyer Persona

1. Personal Background
2. Company
3. Role
4. Challenges
5. Goals
6. Watering Holes
7. Shopping Preferences



Who are  
you  
talking  
to?



# Tailoring Your Message



- How do Boomers like to be communicated with?
- What values do Boomers have that affect your message?
- What pain points do Boomers have?

# Case Study Example

## The Integrated Marketing Strategy:



- What were the integrated marketing strategies
- How did AMI engage fellow advisors
- How did AMI engage business owners
- How did we grow the business

# Step 1: Filling the Funnel



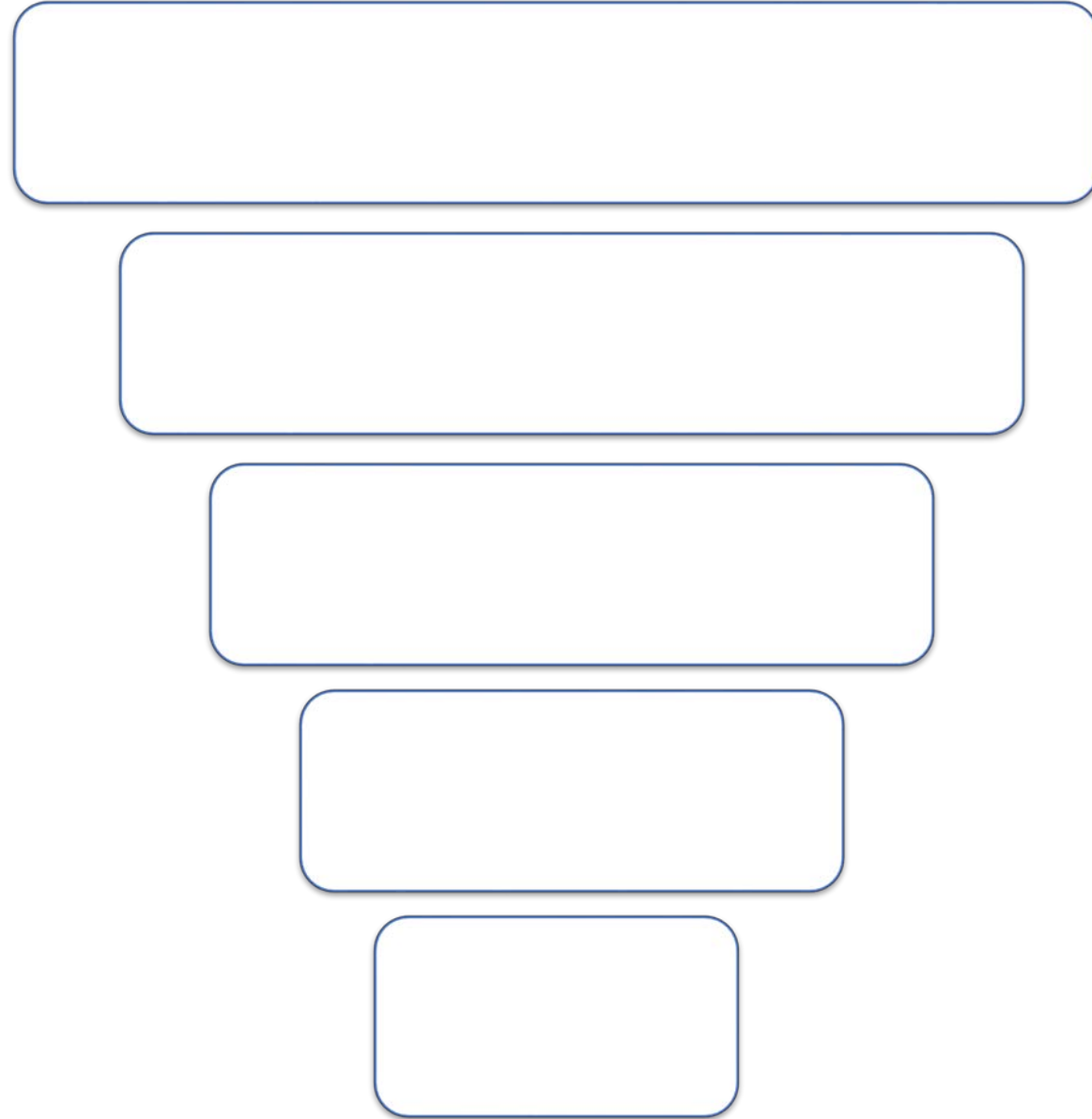
# Lead Sources & Sales Channels

- **Email Campaigns**
- **COIs & Client Referrals**
- **Social Media**
- Website/SEO
- **PR/Media**
- **Sponsored Events**
- Purchased Lists
- **Direct Mail**
- Existing Clients



# Existing Clients

Consider your client book opportunity



# Existing Clients

**Your Corporate Clients**

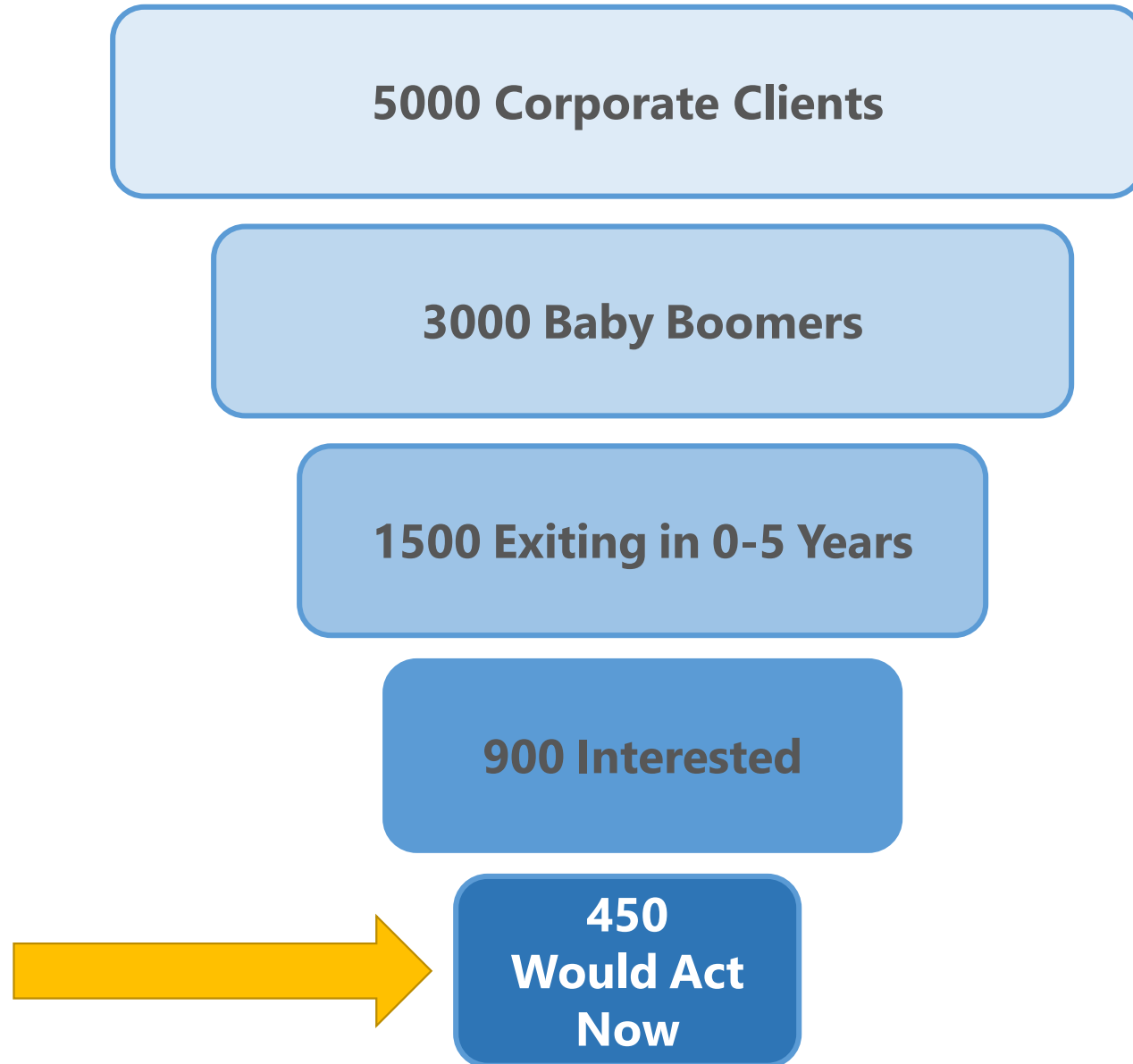
**66% Baby Boomers**

**50% Transitioning  
in 0-5 years**

**Middle 60%**

**READY NOW**

# Existing Clients

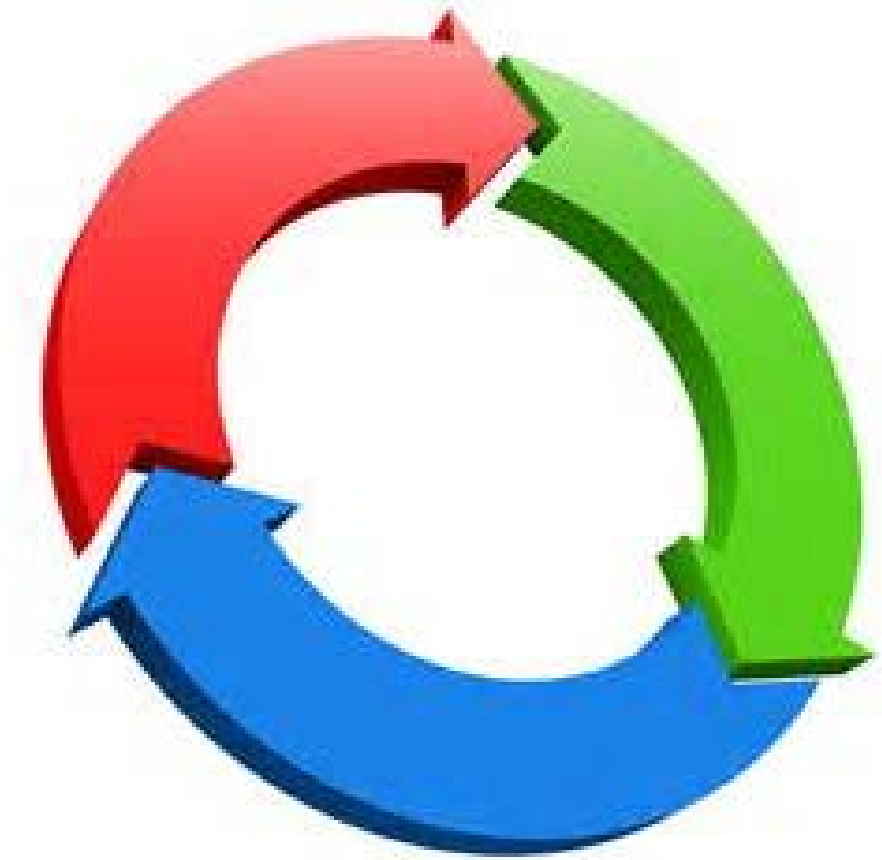


# Step 2: Engage

- *Structural Capital*
- Email
- COIs
- Social Media
- Website/SEO
- CRM System
- Content Marketing
- PR/Media

- **Inbound Marketing**
- Sponsored Events
- Private Events
- Speaking Engagements
- Referral Programs
- Direct Mail
- Webinars
- Lead Generation

# The Relationship



# Effective Email Marketing



# Effective Email Marketing



- Build your database email list!
- Send quality content, survey links, and visually appealing emails to your target audience regularly
- Augment your efforts with personal email outreach
- Monitor your click-through rates and queries and make personal follow-up where appropriate

# Effective Email Marketing

## 9 Critical Components:

- Subject Line
- Sender Name
- Personalization & Relevance
- Body Copy
- Image
- Call-to-Action
- Social Sharing Links
- Unsubscribe Link
- Mobile Optimization

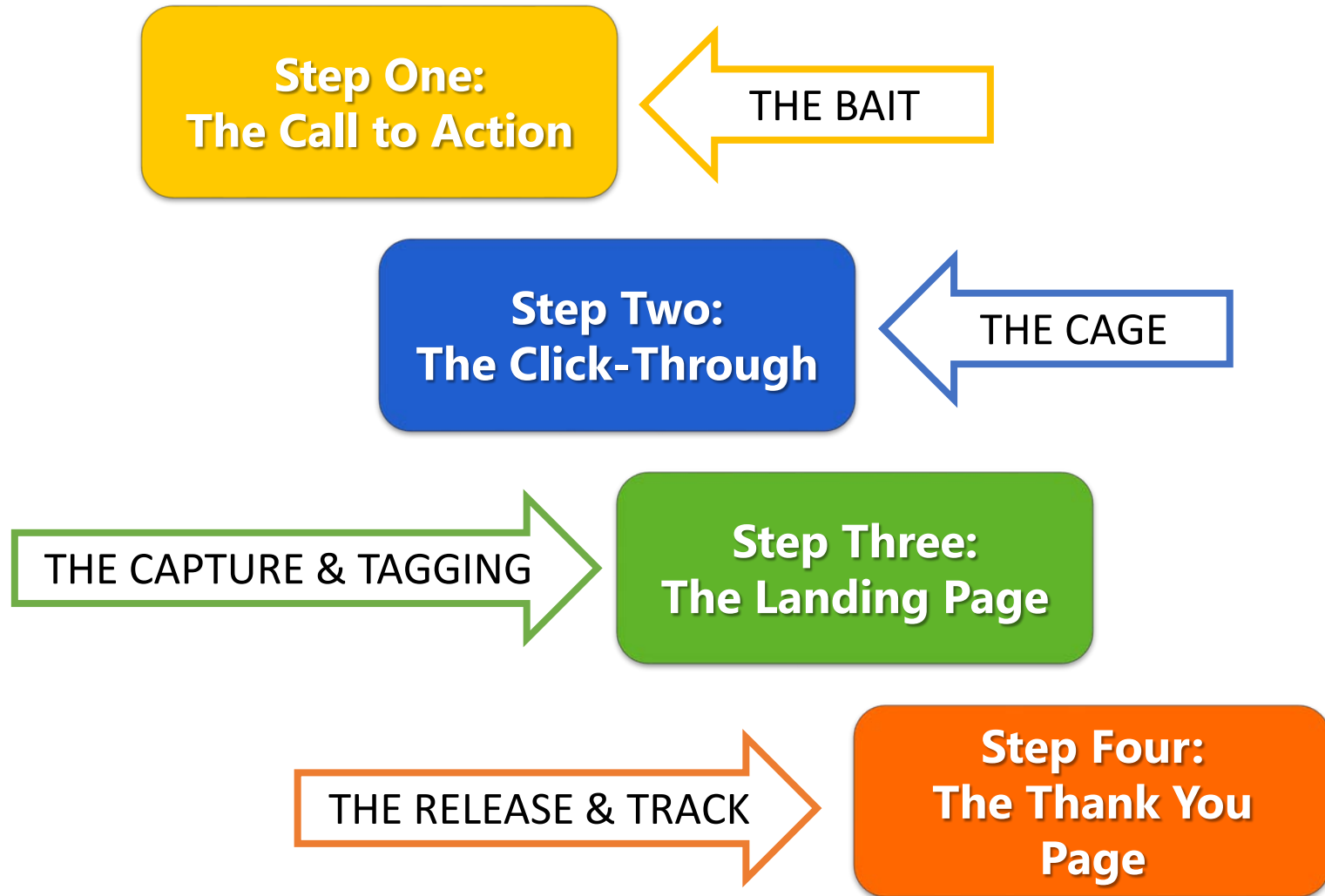


# Effective Email Marketing

## Tips for Effective Email Marketing:

- Interesting subject line
- Visual elements
- Don't give it all away (info-wise)!
- Mobile friendliness
- Keep it brief
- Clear Call-to-Action

# Digital Conversion Path



# Digital Conversion Path

**Email your followers and pose an offer & CTA:  
Download my whitepaper, "How to Accelerate  
Business Value in 90 Day Sprints."**

**When they click, your database will capture  
their activity! They are intrigued. Navigate  
them to your [www.AccelerateBizValue.com](http://www.AccelerateBizValue.com)  
page.**

**Require the person to fill out a form to get  
access to the whitepaper. Get their name,  
company name, title, city, and email address.  
If they complete it, you KNOW they are  
interested.**

**Once they fill out the form, redirect to a  
Thank You page. And give more options for  
downloads, webinars, and subscription. Track  
their behavior!**

# Building a Digital Sales Funnel



# Direct Mail



- Reach a prospect offline
- Send personalized letters and gifts to gain attention and build rapport (Every Family's Business, Walking to Destiny, The Master Plan)
- Target specific contacts and send printed newsletter or quality content

# Social Media Marketing



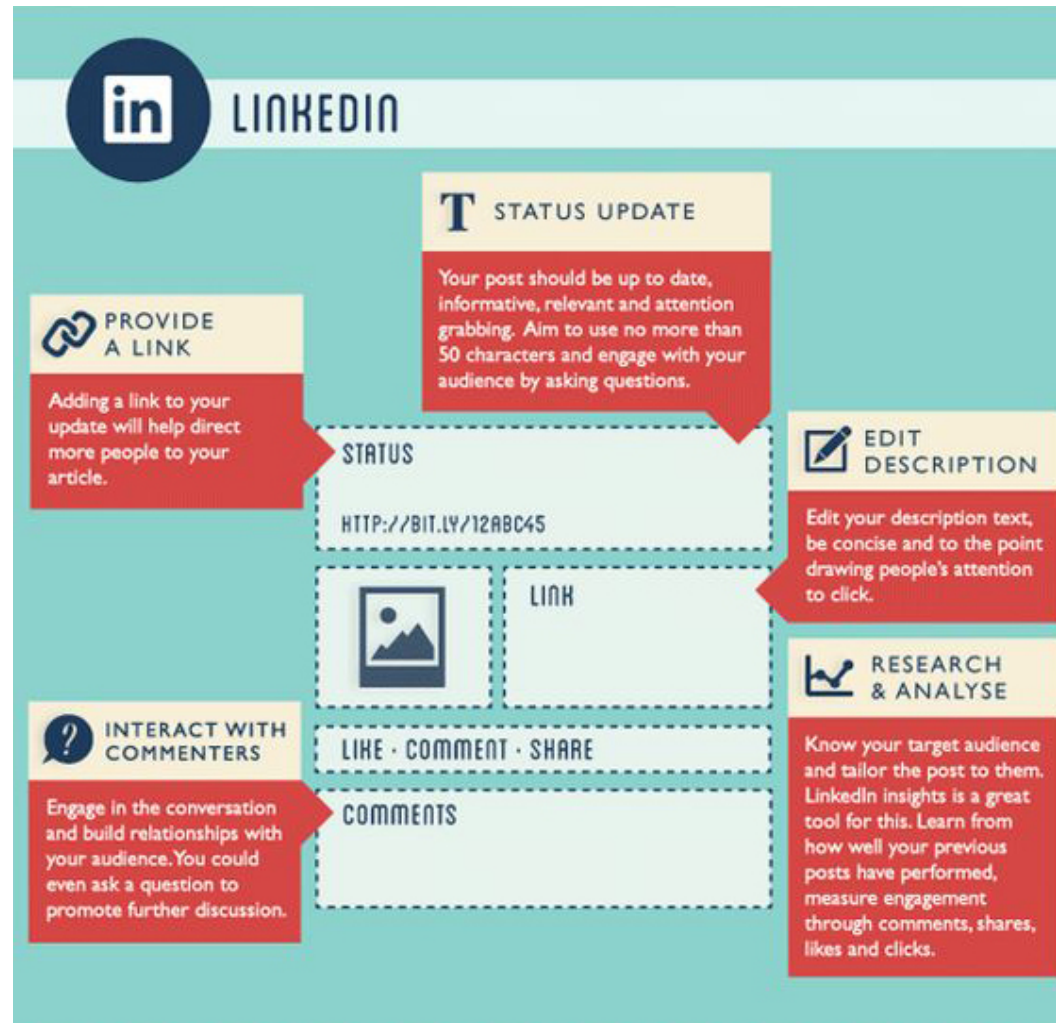
**Using social media can drive more attention to your site and help COIs and prospects connect with you and your brand.**

# Social Tips



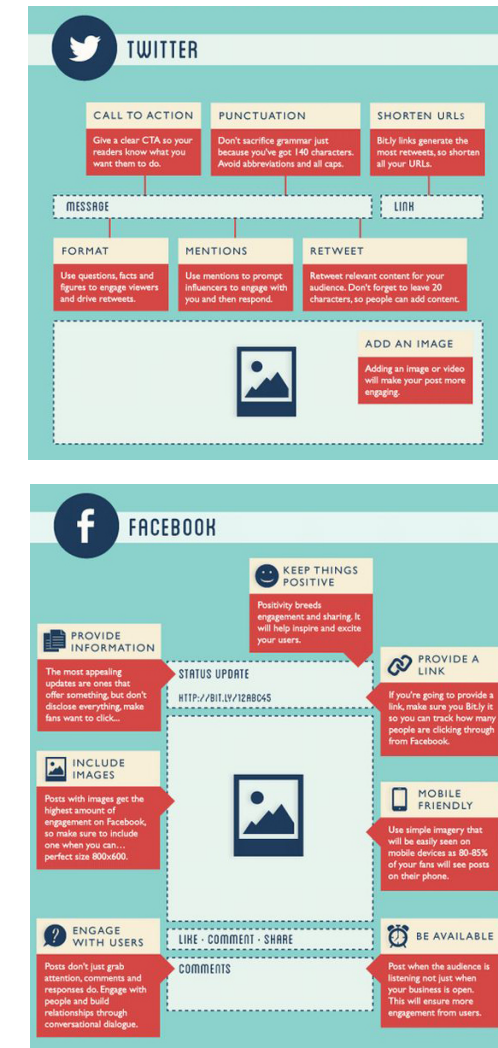
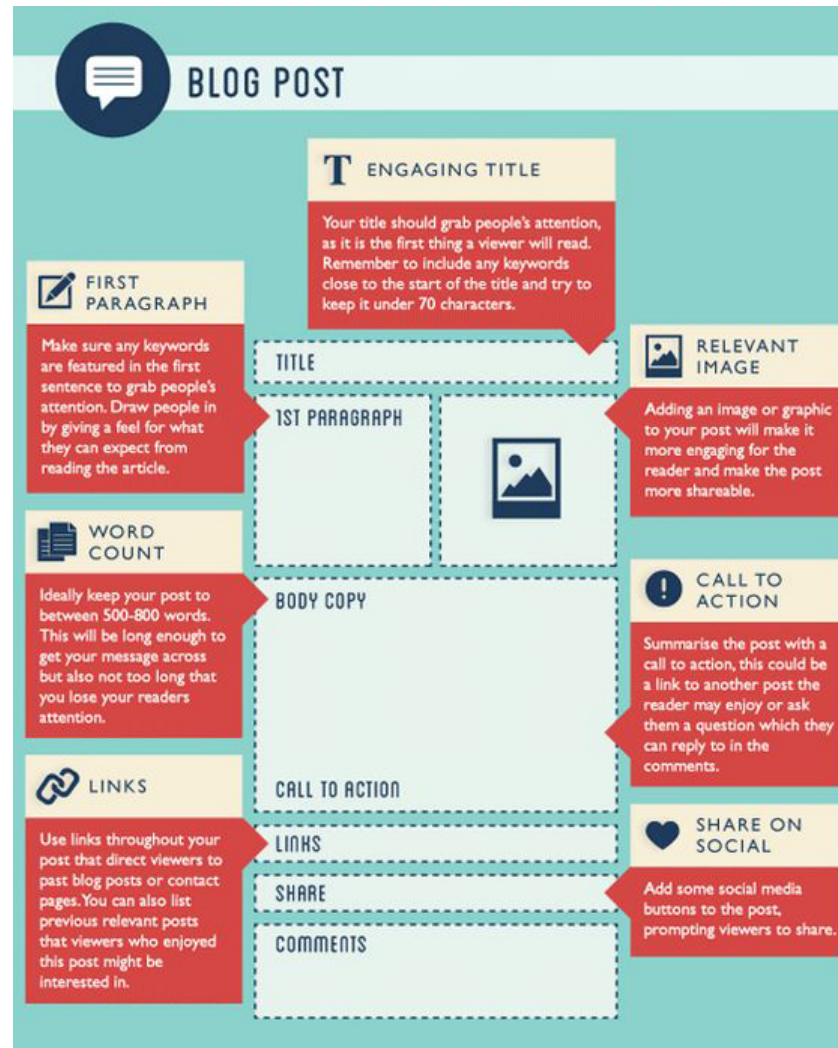
- Post regularly and often
- Respond to comments and queries promptly
- Personalize to build a brand people identify with
- Post with pictures
- Link back to your offer on your site
- Make a calendar you can easily follow

# Social Media Marketing



- A great place to connect with CEOs and COIs
- Personalize your invitations
- Optimize your keywords for searching
- Take 20 minutes a day

# Social Media Marketing



# Building an Editorial Calendar

## Get Organized

- Make a manageable plan ([calendar](#))
- Make deadlines and outline posts in advance
- Automate!
- Link back to your site, landing page, offer capture forms
- Measure your efforts ([ROI calculator](#))

# COIs & Client Referrals

- Get involved with Chapters
- Ask for referrals from existing clients
- Host Advisor Dinners and Happy Hours
- Reach out to local Economic Department, Chamber of Commerce, and owner groups to establish relationships
- Maintain cross-functional relationships with quality advisors from all specialties



# Thought Leadership

It is not simply knowing a lot about something and writing about it. Thought leaders take a position and become a regarded expert and specialist in a specific niche area.

Determine what you are going to build your brand around and focus your outputs on that.



# PR & Media



- Submit articles, whitepapers, and events to industry publications
- Reach out to local Economic Department, Chamber of Commerce, and owner groups with whitepapers and speaking opportunities
- Reach out to Financial/Economy/Entrepreneur journalists in your local market

# Sponsored Events

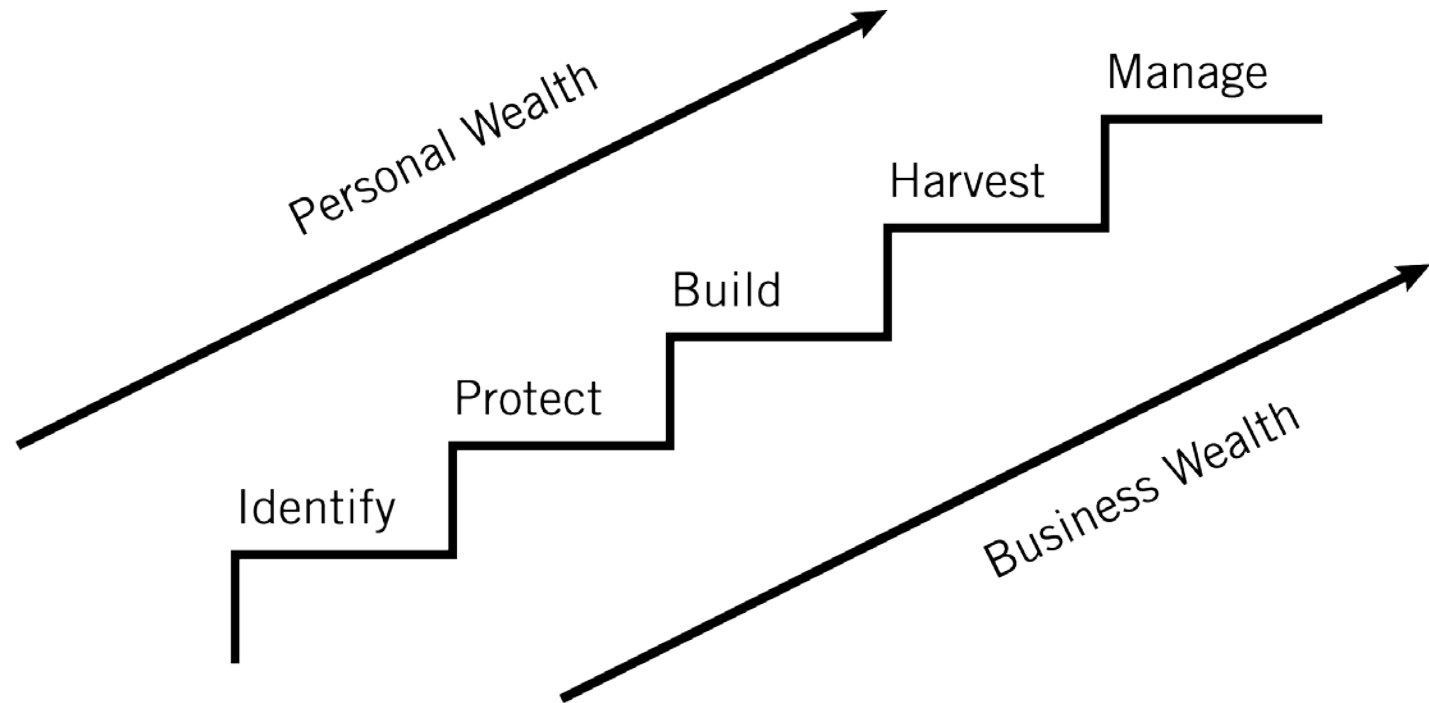


- Sponsor an advisor event to grow visibility and rapport with that referral network
- Sponsor an owner event to get your brand and message directly to your prospective end client
- Sponsor a private course or workshop for clients
- Attend and/or sponsor industry association tradeshow and conferences
- Look for opportunities to sponsor and speak

# Sponsored Events

## Owner Roundtables

- Five Sessions over Five Months around the Five Stages of Value Maturity



# Sponsored Events

## Owners Forums



# How to Close

**Anticipate MULTIPLE meetings.**

**Provide a tool for them to benchmark.**

**Engage in an event.**

- Roundtable, happy hour, workshop, etc.

**Outline next steps.**

# Observe & Review

- Be Authentic.
- Educate on concepts.
- Listen. Ask questions.
- Illustrate benefits, metrics, & deliverables.
- Highlight the roles of the team.
- Provide a tool.
- Leave with an invitation.



# Next Steps

- **How did you rate yourself?**
- **Next 30 day goals?**
- **Next 90 day goals?**



# Final Wrap-up & Questions