



## SIX STEPS TO SPARK SUCCESS

Use this marketing plan workbook to level up your game.

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**RAYMOND JAMES**

# Without marketing, you'll be your best kept secret.

There's no other advisor like you –  
and no business like your own.

Marketing tells clients why that is and, more importantly, why they should care. The right strategies bridge the gap between where you are and where you want to be, connecting you with your ideal clients and fueling your success each step of the way.

Don't just take our word for it: 75% of small business owners believe internet marketing is crucial in attracting new clients.' Simply put, marketing matters – that's why we made this guide, and why we made it as easy as possible to get started. In just six steps, you'll learn top marketing skills, trends and tactics to level up your marketing game.

Read on.

\*Source: [fundera.com](http://fundera.com)

STEP

**1**

**SET YOUR GOALS**

**You have a vision  
for your business.  
Bring it to life.**

Not all goals are about growth. Maybe you want to refine your ideal clientele. Or perhaps develop a succession plan for your practice, or cultivate client relationships that span multiple generations.

Whatever your goals are, they'll shape your marketing plan from start to finish.

## MAKING YOUR MARK

Determine what you want to accomplish through your marketing plan:

—

**Increase AUM or production**

—

**Expand average relationship size**

—

**Reduce regrettable attrition**

—

**Deepen client relationships**

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**Grow your number of ideal clients**

Once you know your objectives, write them down and make sure they're SMART: specific, measurable, attainable, relevant and time-based.

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STEP

2

## SPOTLIGHT YOUR AUDIENCE

**You know the clients you want. Grab their attention – and their business.**

Play to your strengths

You can't be all things to all people.  
That's not marketing; that's pandering.  
Distinguish yourself by playing to your target audience  
and your specific strengths.

YOU KNOW YOURSELF BEST.

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—

**Which professions do you align with or have an affinity for?**

—

**Which financial situations allow your skills to shine?**

—

**Which groups can benefit most from your expertise and why?**

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**NEXT, LOOK AT YOUR BEST CLIENTS – THE ONES YOU’D WANT MORE OF:**

- Home in on their similarities. What are their ages, careers and lifestyles? Where do they live? What are their go-to media outlets?
- Discover their hobbies, passions and worries.
- Determine what appeals to them most – from alternative investments to retirement goals.

## NAIL DOWN YOUR NICHE

Niches can range from broad (think business owners and retirees) to specific, such as athletes, doctors and corporate executives in a particular industry. Advisors have specialties on specialties. Explore yours below, using our Ideal Client Profile for additional guidance.

POWER MOVE

Explore your target market using Practice Intelligence expertise.



## DEFINING YOUR AUDIENCE EXERCISE

Think about your best clients or any new niches you'd like to cultivate. Next, use the tables below to help you develop ideal client profiles to describe their common characteristics. This will help you not only recognize where you should focus your efforts, but also enable you to determine the qualities you value most and should look for in prospective clients.

### IDEAL CLIENT PROFILE #1:

OCCUPATION:	AGE RANGE:
HOBBIES:	PLANNING NEEDS:
INCOME RANGE:	ORGANIZATIONS:
GEOGRAPHY:	INVESTABLE ASSETS RANGE:
PERSONALITY:	SOCIAL CIRCLE:
CENTERS OF INFLUENCE/CONNECTORS:	WHAT THEY WATCH/READ:

### IDEAL CLIENT PROFILE #2:

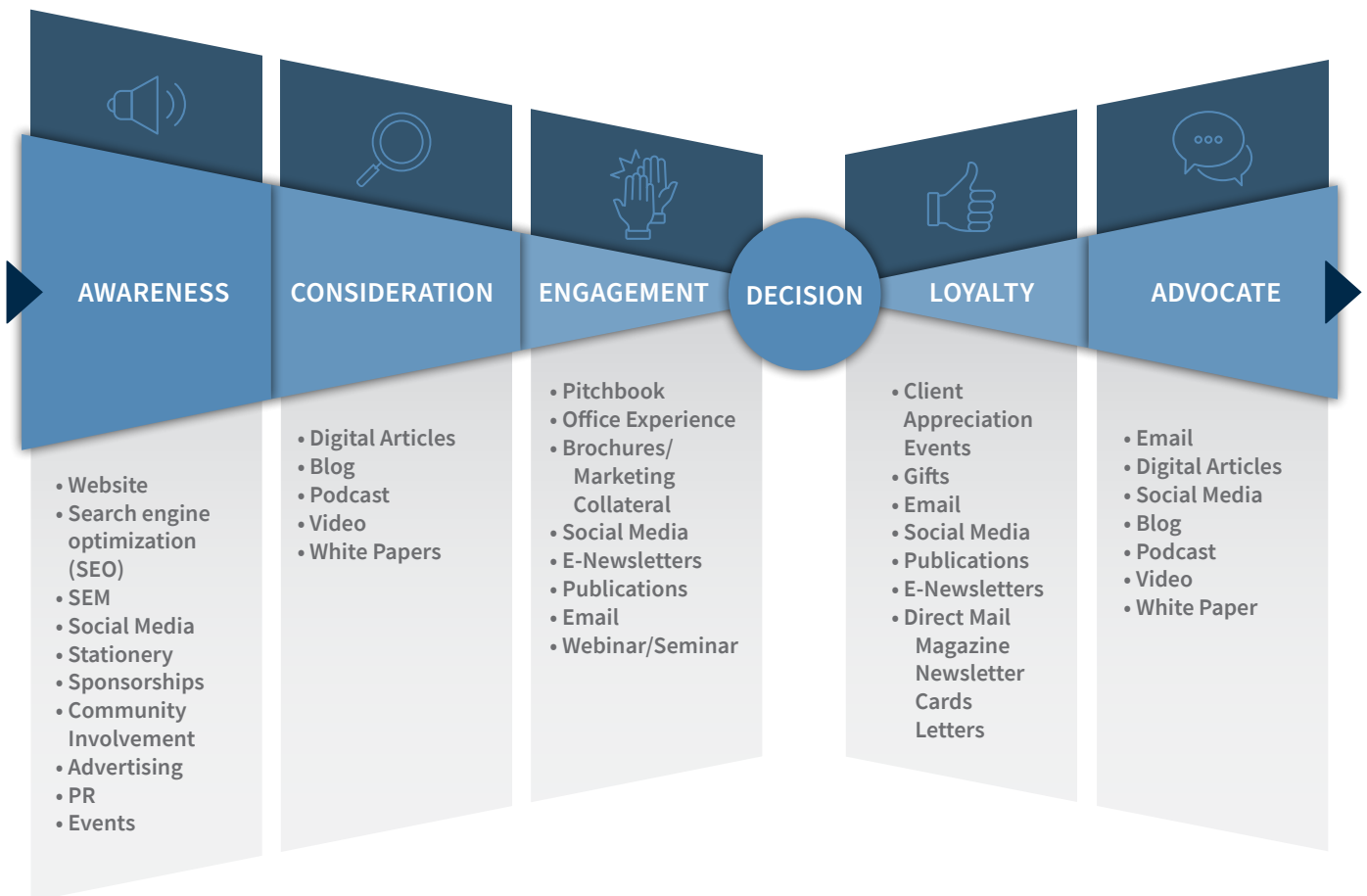
OCCUPATION:	AGE RANGE:
HOBBIES:	PLANNING NEEDS:
INCOME RANGE:	ORGANIZATIONS:
GEOGRAPHY:	INVESTABLE ASSETS RANGE:
PERSONALITY:	SOCIAL CIRCLE:
CENTERS OF INFLUENCE/CONNECTORS:	WHAT THEY WATCH/READ:

### MAPPING THE CLIENT JOURNEY

While you work to connect with your ideal audience, keep in mind that your prospect will walk through different phases before evolving into what you really want: a true advocate. The journey is simple to explain, but it takes focused marketing to continue the forward progression, which we've outlined below.

And remember, as each client progresses, you'll want to find a strategy (or two, or three) that'll resonate with their needs and where they are in their journey toward becoming your brand advocate.

## The Client Journey



Your ultimate mission?  
To inspire others to sing your praises  
even when you're out of earshot.



STEP

3

## BUILD A BOLD BRAND

**Harness your strengths and highlight your differentiators.**

### Polish your UVP

Think of your unique value proposition (UVP) as your formal elevator pitch. It's a clear statement that describes the benefits of your service, how you address your clients' needs and, perhaps most importantly, what distinguishes you from competitors.

No matter if you're building a brand that's all your own or leveraging the established reputation of Raymond James, you'll want to capitalize on your UVP.

## UVP EXERCISE

Use the following steps to help articulate and refine your UVP. Once you've identified each of the three key elements, put them all together in a single phrase that will provide you the basis for your marketing message across all of your touchpoints with your network.



(My business serves)

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+

(Who are looking to / in need of / worried about)

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+

(By)

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=

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**NOW, WRITE IT AS IF IT WERE A TWEET (280 CHARACTERS OR LESS).**

Keeping your UVP to this length will help others (team members, clients, etc.) remember it.

*Example:* "We help small business owners to tax-efficiently convert some or all of their equity into cash flow to fund the next chapter of their lives."



**ALL BRANDS TELL A STORY. WHAT'S YOURS?**

Now that you have your UVP, tell a story your clients want to hear – with you as the hero, of course. And tell it often. Add your touch to existing marketing materials, making your office decor, logo and digital presence a reflection of you, your practice and your values. It's about refining your image and projecting the purpose that drives your business.

**ASK YOURSELF:**

<p>—</p> <p><b>What type of message do I want to get across?</b></p>	<p>—</p> <p><b>How do I want to be perceived?</b></p>	<p>—</p> <p><b>What do my website, social media, stationery, office experience and supporting materials reflect about me and my service?</b></p>	<p>—</p> <p><b>Do I have a consistent message and does it emphasize what differentiates me from other advisors?</b></p>
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Once you've got this down, make sure your brand evokes a professional look and feel through coordinated colors, imagery, language, style and – this is key – client experience.

## AUDIT YOUR EXISTING MARKETING COLLATERAL

Using the questions above as a guide, take a moment to review your current brand materials and marketing collateral against what you envision.

POWER MOVE

Amplify the power of your brand with help from the experts at Raymond James Marketing



### BRAND AUDIT EXERCISE

The client journey from step 2 lists all the interactions you have with contacts during the various stages of a relationship. Go through the stages and identify the areas you are currently utilizing or areas where you do not have a presence but would like to. Audit these touchpoints for brand consistency. This will help make sure you are sending the same message through each area of contact you have with your audience in order to remain credible and impactful.

	NOT APPLICABLE	NONEXISTENT BUT NEEDED	EXISTS BUT NEEDS WORK	SATISFACTORY
<b>ESSENTIALS:</b>				
STATIONERY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MARKETING COLLATERAL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WEBSITE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SOCIAL MEDIA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EMAIL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>ADD-ONS:</b>				
ADVERTISING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PITCHBOOK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEARCH ENGINE OPTIMIZATION (SEO)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DIRECT MAIL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OFFICE EXPERIENCE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WEBSITE RESOURCES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>ADVANCED:</b>				
VIDEOS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PODCASTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BLOG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NEWSLETTER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EVENTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT SATISFACTION SURVEY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEARCH ENGINE MARKETING (SEM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GIFTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEMINAR/WEBINAR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PUBLIC RELATIONS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SPONSORSHIPS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

STEP

4

## CREATE YOUR GAME PLAN

# Craft your game plan using core marketing strategies.

Just like in any sport, your game plan will consist of coordinated plays – in this case, marketing strategies – to reach your end goals. And don't forget: Forward progress is progress, even if it's slow at first. So start by choosing one or two options that fit your skill set, time and effort level.

Don't forget to revisit "The client journey" from step 2. For instance, do you want to focus on the awareness phase? Then consider optimizing your website for better search results and leveraging free social media content using the compliant and easy RJ Connect app.

## Ripe for the picking

When it comes to strategies for your game plan, there are seemingly endless marketing options and goals. But don't feel pressured to try a little of everything. Just keep your audience and goals in mind as you choose the options that are right for you – those that feel achievable – and then try something new your next round.

### DIGITAL MARKETING

#### DIGITAL CONTENT MARKETING

Demonstrate your expertise through valuable curated content (such as digital articles and newsletters) or your own thought leadership (blogs, videos, podcasts, etc.) on your website.

#### SOCIAL MEDIA

Social media can help you showcase your knowledge and authentically connect with others – as well as build your brand personality and legitimize your business.

#### EMAIL MARKETING

Sharing digital content through email is vital to any successful digital marketing strategy. Whether you're using it as a personalized touchpoint or for timely service updates, emails offer a convenient way to stay in touch.

#### SEO, SEM AND WEB MARKETING

Search engine optimization (SEO) and search engine marketing (SEM) are two sides of the same coin. Their goal? Driving traffic to your website.

SEM includes paid search, Facebook advertising and display advertising. There's also technical SEO, a built-in component of Raymond James-hosted websites; on-page SEO, which helps optimize your website through new and updated content; and off-page SEO, also known as interlinking.

### ADVERTISING AND SPONSORSHIPS

Promote your business through paid advertising. Leverage the Raymond James brand or your own through online, print, radio and TV ads – yours or ours. Consider deepening your roots in the community by sponsoring local events.

### NETWORKING AND REFERRAL MARKETING

Cultivate centers of influence and expand your networking reach by hosting engaging online or in-person events, being a guest speaker at seminars/webinars, joining local organizations, and attending community and industry events.

### SEMINAR/WEBINAR AND EVENT MARKETING

Another variation of networking is event marketing to build relationships with existing clients and gain new referrals. Consider client appreciation events, seminars/webinars and sponsorships.

### DIRECT MAIL MARKETING

Wow clients and prospects with curated (and consistent) communication. Leverage regular touchpoints, such as WorthWhile magazine, letters and cards for special occasions – easy ways to stay top of mind with top-tier clients.

AS YOU CONTEMPLATE THE STRATEGIES ABOVE, ASK YOURSELF:

How much time  
can I dedicate  
to marketing each  
week or month?

Be realistic  
and consistent.

Ten minutes all you've got?  
Use it wisely.

Do I have a team  
member, such  
as an assistant,  
who can dedicate  
time toward  
my marketing  
strategies?

Based on my  
budget, which  
strategies  
are easiest to  
implement?

My time for marketing activities each week:

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Team member's time for marketing activities each week:

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Budget for marketing:

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Other considerations:

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## PRO TIP

**Choose achievable marketing tactics** that'll resonate with your audience. After all, there's no sense in emailing a client who ignores their inbox or hosting in-person events for faraway homebodies.

## DID YOU KNOW?

**According to the Small Business Association**, most small- to medium-sized businesses should allocate 2% to 5% of their yearly budget to marketing. But newer advisors may want to spend up to 20% when launching their practice.

STEP

5

## PICK YOUR PLAYS

**Breathe life into your strategies  
with the right tactics.**

### A winning formula

You've selected your strategies.  
Now it's time to complement them with deliberate tactics.

While these may seem like interchangeable terms, tactics are the actions you can take to execute your strategies. If one of your strategies is digital content marketing focusing on social media activity to connect with clients and prospects, for instance, your tactics should include using RJ Connect to access compliance-approved, professionally written content that makes scheduling posts, even full campaigns, a breeze.

But RJ Connect is just the beginning. Raymond James offers countless turnkey, compliance-approved materials to seamlessly – easily – get in front of your chosen audience. Plus, you have the flexibility to create your own content, if you're so inclined.



## The three layers of tactics

Marketing tactics can be broken down into three levels grouped by marketing type: essentials, add-ons and advanced. First things first, so make sure to complete the essentials before advancing to the next level. Keep in mind, you'll want to play to your strengths. No need to swing for the fences; any amount of time and effort dedicated to the cause will yield results.

### 1

#### ESSENTIALS

These are crucial marketing elements that require minimal time to establish and are often free, such as:

- **Setting up your website with your UVP, team bios, updated headshots, services and niches**  
Hit the ground running by exploring your options.
- **Communicating thought leadership through email marketing**  
Set up your distribution lists and streamline your communications.
- **Establishing your social media profiles, connecting them to RJ Connect and subscribing to up to three autopost campaigns**  
RJ Connect offers social media support to help you inform, stay top-of-mind and engage with clients on LinkedIn, Facebook and Twitter.
- **Having stationery – including holiday cards and thank-you notes with your logo**  
Order these and other customized items with the help of Raymond James Marketing.

### 2

#### ADD-ONS

Once you've mastered the essentials, level up to the add-ons:

- Gifting Raymond James publications to select clients and sending out [Investment Strategy Quarterly \(ISQ\)](#)
- Mining our online collection of financial planning materials for additional turnkey, compliance-approved client materials
- Creating your own pitchbook
- Setting up a community page on your website to showcase your local involvement
- Posting original, recurring content – such as blogs – to your website and social media

### 3

#### ADVANCED

These tactics can be time-intensive with added costs:

- Establishing a regular communication plan that wows your audience
- Starting a video series or hosting a webinar
- Content and presents for special events
- Looking into sponsorships and advertising, and creating referral programs

## WHERE TO START

To give you a better idea of where to start, reference “The client journey” in step 2. You want to give them a clear path forward. To do that, you may apply essential tactics from the awareness and consideration phases; add-ons for clients in the engagement section; and advanced tactics for those in the loyalty and advocate stages. You can combine them, of course, just be careful not to bite off more than you can chew. Slow, steady and consistent progress – like investing – is the name of the game here.

	① ESSENTIAL	② ADD-ONS	③ ADVANCED
<b>DIGITAL MARKETING</b>			
<b>WEBSITE</b>	Set up website with UVP, bios, products/services	Add calculators, worksheets, forms	Add events page, intro video
<b>CONTENT MARKETING</b>	Promote curated content on your website through email, such as digital articles	Promote semi-custom content through email. Examples: e-newsletters, Worthwhile digital, CIO content	Promote custom content through email. Examples include video, e-newsletter, podcast, white paper, webinar
<b>SOCIAL MEDIA</b>	Set up RJ Connect profiles and subscribe to automatic campaigns	Weekly posts: link back to digital articles or website content	Weekly posts: mix of curated and custom content including photos/infographics
<b>SEO</b>	Technical SEO: Raymond James-hosted websites are already SEO optimized	On-page SEO: optimize site through fresh content	Off-page SEO: optimize site through external linking
<b>SEM/PAID MEDIA</b>			Digital advertising program: Facebook ads and Google paid search
<b>TRADITIONAL MARKETING</b>			
<b>PRINT MATERIALS</b>	Stationery, product/service/ Raymond James brochures	Bio fliers, target market fliers, pitchbook	Custom stationery and print collateral
<b>DIRECT MAIL</b>	Letters, holiday cards, thank-you notes	Publications: WorthWhile, ISQ	Custom newsletter, gifting
<b>PRINT ADVERTISING</b>		Preapproved ads for newspaper and magazine	Custom ad for any publication
<b>BROADCAST &amp; OUTDOOR ADVERTISING</b>		Preapproved ads for TV and radio	Custom ads for TV, radio and billboard
<b>EVENTS, SPONSORSHIPS &amp; PR</b>			Events, seminars, PR and sponsorships

## DOMINATE THE WEB

Think of your website as a window into your business. The view should entice, impress. And tell your story, from your expertise to your capabilities. It's also a 24/7 proof point of your skills and our firm's support.

These days, websites need to be mobile-friendly as well. Consider this: 75% of clients judge a company by its website design. What's more, 87% of Americans use the internet, including their smartphones, to research products and services – so making your website responsive is a must. The good news? All Raymond James-hosted sites are automatically responsive.

Of course, any worthwhile website merits a dedicated audience. That's where strategies like SEO and SEM come in.

## GET SEO AND SEM SAVVY

SEO isn't just a buzzword. It's an ongoing process that makes it easier for ideal clients to find you by helping you rank higher in search engine result pages. Not convinced? Consider this: 34% of prospects seeking an advisor start with a "cold" online search, according to a 2018 study by AdvisorEngine. So while word-of-mouth referrals are still the most prominent way prospects find advisors, search ranking matters.

Fortunately, Raymond James-hosted websites are continuously updated with the latest digital articles, videos and podcasts – helping you reap the benefits of SEO without breaking a sweat. Advanced marketers can take things a step further by engaging paid search or blogging their way to boosted rankings.



## PRO TIP

**If SEO is your strategy,** Google Analytics should be your best friend. Fortunately, Raymond James provides guides for reading and requesting your Google Analytics reports.



## NEED A WEBSITE?

You want to engage clients and create forward motion with integrated marketing. At the foundation of your efforts, from social media posts to email campaigns, will be a website that clearly communicates your value and is optimized for SEO and mobile devices. Because we value independence, we empower you to customize these resources to truly make them your own.

## REFINE YOUR SITE

Use your website as a springboard for your thought leadership by posting relevant financial planning content. Think content from Forefield or your own content covering topics your clients regularly bring up. This add-on tactic allows you to resonate with your audience by addressing common client questions and concerns, as well as distinguish the value of your service. And engaging content doesn't just drive website traffic and increase leads. It also bolsters your reputation and fosters your professional integrity.



## PRO TIP

**Make the most of new website content** by promoting it on your social media and through personalized emails.

## THE 3 C'S OF DIGITAL CONTENT

These C's conveniently align with essential, add-on and advanced marketing.

### 1. CURATED

Created by Raymond James, Forefield or another third party, this includes a thoughtful selection of digital articles, white papers, infographics and videos.

### 2. SEMI-CUSTOM

Curated content, such as digital newsletters, that you can customize with your compliance-approved insights.

### 3. CUSTOM CONTENT

From blogs and videos to podcasts, this refers to content created exclusively by you.



## KEEPING IT FRESH?

**Raymond James-hosted websites are automatically updated on a weekly, if not daily, basis.** Featuring a variety of formats – including articles, videos, podcasts and infographics – these resources can support client conversations on everything from market conditions to longevity planning.

To explore the type of content automatically featured on Raymond James-hosted sites, visit our [Commentary & Insights](#) page.



## Aspire to inspire with a blog ③

You don't have to be the next Dave Ramsey or Suze Orman to benefit from blogging. As long as you have informative, relevant content to share (think Motley Fool), blogging can boost client engagement and drive traffic to your website and social media pages.

You'll want to start small, ideally with a monthly blog. Once you've established an audience, up your frequency to twice a month. And then – if time allows – go for weekly posts.

First-time blogger? We've got you covered: Work with Raymond James marketing to uncover a slew of tips and tricks.



## Lights, camera, action! ③

Connect with your target audience by filming videos on current market conditions and popular financial planning topics. Videos can also help viewers get acquainted with you, fostering a sense of trust.



## Give the gift of gab ③

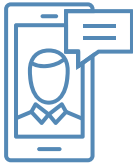
Podcasts offer another avenue to authentically share your knowledge with an unlimited audience – including your niche market. If you're not sure how to get started, read these [top podcast tips](#).



## Captivate clients with Canva ③

Cook up a feast for the eyes with our subscription-based infographic tool, Canva. Featuring eye-catching designs, Canva adds a personal (and on-brand) touch to your client communications – from social media graphics to invitations and birthday or anniversary graphics that can be added to email greetings.

## Conquer social media



Social media is a marketing must – especially when more than 70% of Americans reported having an account in 2019. So while social media isn't for everyone, it's an essential component of growing – and legitimizing – your practice by communicating with your audience in a channel where they're spending lots of time.

Start by determining which social networks best fit your image and target audience. Facebook showcases your practice's winning personality. LinkedIn? Your expertise. Twitter? Your responsiveness.

All social media for RJA and RJFS advisors is managed through RJ Connect, which has hundreds of preapproved posts for you to promote. You can even schedule them for when your specific audience is most engaged and use the RJ Connect calendar to keep track.

①

**ESSENTIALS** – Having a social media presence is a must. Set up your profiles through RJ Connect and select two auto-post streams, which will automatically publish new content for you. Next, select at least two more posts from the recommended suggestions to schedule out each week. And if you've recently posted new content on your website, make sure to promote it through a social media post.

②

**ADD-ONS** – Schedule your social media posts in advance. Aim for three to five posts per week covering a mix of financial planning and lifestyle content. Use the calendar within RJ Connect to keep track of what you've scheduled out. You can set personal and professional interests in RJ Connect and let the tool find content from outside publishers (think Reuters, USA Today and others) around your interests for you to choose to post.

③

**ADVANCED** – Showcase your authenticity through custom posts. Consistency is key, so try to set aside 10 to 15 minutes a week to schedule out these posts. You can add photos from a recent event or charity, spotlight office staff (and even their pets), and share photos of your interests and hobbies. This will allow you to connect with clients and prospects on a more personal level.



### PRO TIP

**Maximize your social media impact** with a mix of market, lifestyle and branch happenings. These types of personal posts are proven to garner more likes and shares than others.

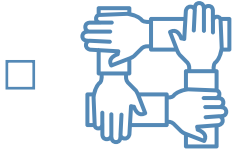


## Venture into advertising

Amplify your advertising endeavors by customizing preapproved, predesigned content and tailoring it to your specific business and clients:

- 1** **ESSENTIALS** – Use Raymond James brochures and your own branded stationery to impress your audience and resonate with their needs. Explore your options and order through Marketplace.
- 2** **ADD-ONS** – Expand your brand with semi-custom print ads, TV commercials and even radio spots.
- 3** **ADVANCED** – Make your mark on your community through commercials, billboards and custom print ads in local newspapers or magazines.

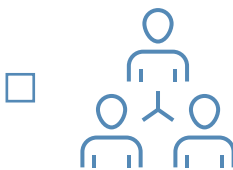
**Make an impact with a skilled, full-service team.  
Raymond James Marketing is just a call or email away.**



## Care for your community

At Raymond James, we're proud to support the communities in which we live and work. Here's how to grow and strengthen yours:

- ① **ESSENTIALS** – Use Raymond James Cares to showcase your community contributions.
- ② **ADD-ONS** – Make the most of Raymond James Cares Month by joining nearby associate-led volunteer opportunities.
- ③ **ADVANCED** – Team up with Raymond James to host events that maximize your local impact. And showcase your efforts through your website and social media.



## Network your way to success

Get in touch with your ideal clients through dedicated networking:

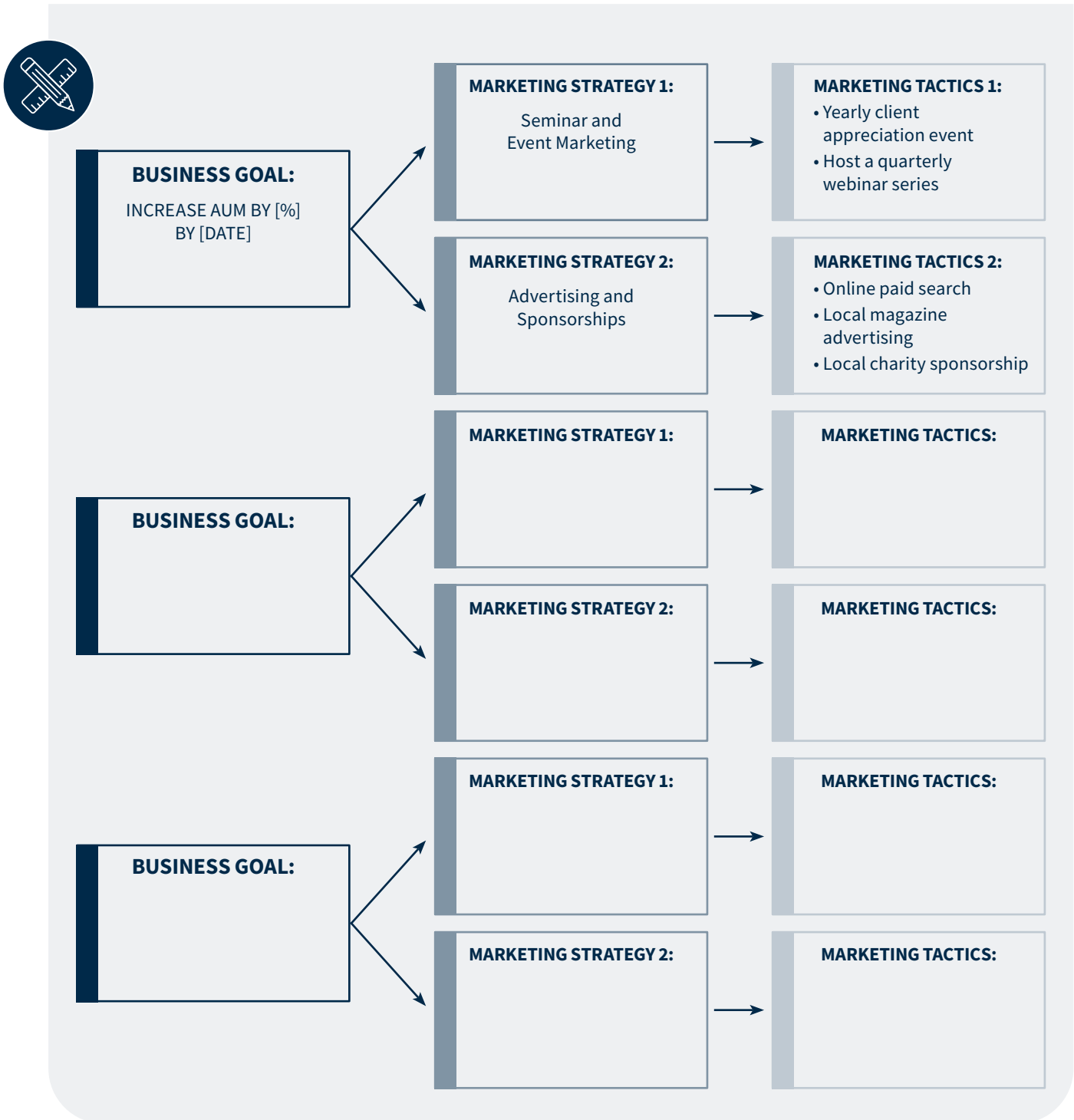
- ① **ESSENTIALS** – Harness social media – including Facebook, LinkedIn and Twitter – to connect with prospects and clients, covering topics that speak to their needs.
- ② **ADD-ONS** – Garner referrals and showcase your expertise by hosting engaging webinars and seminars and serving as a guest speaker at similar industry events.
- ③ **ADVANCED** – Cultivate meaningful relationships through client appreciation events.



PUT IT IN PRINT

Now that you have a clearer idea of which strategies best align with your goals and marketing activities, put them in writing.

HERE'S AN EXAMPLE:



STEP

6

DRIVE YOUR SUCCESS

**Success isn't static.  
Here's how to fuel yours  
for the long run.**

### Captivate clients

As with any relationship, it's crucial to communicate well. That's where Raymond James' customer relationship management tool comes in. The more accurate and complete a client's profile is, such as with their topics of interest and contact preferences, the more effective your communication plan will be.

## Stay future-focused

Take your service to the next level by developing a 12-month communication schedule tailored exclusively to your clients' needs and preferences. Note pertinent details, such as:

- Topics that pique their interest
- Preference for print or digital communication
- Preferred contact frequency (weekly, biweekly, monthly, etc.)

Maximize your efforts by personalizing content to specific niches, such as business owners, women investors or pre-retirees. Just keep your lists manageable so you know when to send different materials.

## Success isn't static – but it is measurable

Here are a few ways to track yours:

- Use RJ CRM to track activities and determine effective methods for garnering leads and new clients.
- Consider forming a client advisory board or sending surveys to regularly collect feedback from clients on your marketing efforts – such as events, review meetings and other frequent communications.
- Set up meetings with your team to analyze progress, discuss feedback and plan any necessary changes.
- Monitor your website and social media stats using tools like Google Analytics and RJ Connect.
- Gather onboarding information – such as asking clients how they heard about you – to determine referral sources, successful advertising efforts and more.

## ONWARD AND UPWARD

Don't let your marketing plan die in the good idea graveyard. This is your chance to leave a lasting impression on your target audience and create a legacy for years to come. It's also an opportunity to turn prospects into advocates, guiding them through the twists and turns of the client journey.

Most of all, marketing is a way to make your business all your own and make it more than worthwhile for your valued clients.

# RAYMOND JAMES®

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER  
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