

Marketing blueprint

Build a strategic plan of marketing leads

The marketing blueprint is designed to help you build a tailored marketing plan for your practice. The blueprint is split into three sections with three boxes in each. The first section talks about prospects: who you want to work with, what their pain points are, and where they hang out. The second is about clients: how you keep them happy, how you'll up-sell and how you'll get referrals. The last section is about leads: how you'll turn prospects into leads, nurture them, and turn them into clients. So the marketing blueprint covers the whole marketing cycle.

Prospects

Who is your **ideal prospect** and what are their **pain points**?

How do you solve the **pain points** of your ideal prospect?

Prospect map: Where does your ideal prospect hang out?

Clients

How do you keep your **customers happy**?

How will you get more sales from **existing clients**?

How do you get clients to give you **referrals**?

Leads

How will you turn prospects into **leads**?

How will you **nurture** your leads?

How will you **turn leads** into clients?



90-day marketing plan:

The tactics

This plan details your marketing activities over the next three months and keeps you on track and accountable. One of the biggest problems advisors have when marketing their firm is perseverance. Grand ideas and plans for marketing are great but after a few weeks the busy work takes over and marketing gets dropped. The 90-day action plan helps you create a workable system for marketing your business.

Week 1	Week 2	Week 3
Week 4	Week 5	Week 6
Week 7	Week 8	Week 9
Week 10	Week 11	Week 12



Score Card

Assess the success of your marketing efforts with the Marketing ScoreCard

YOUR FIRM NAME

DATE

Total number of current clients

Target client number

GROWTH MARKETING METRICS

Target new clients 2

Meeting conversion rate (%) 5000%

Meetings needed 4

Lead conversion rate (%) 5

Leads needed 80

PROFITABLE CLIENTS METRICS

Target upsells 10

Meeting conversion rate (%) 7500%

Meetings needed 13

Lead conversion rate (%) 2000%

Leads needed 67

GOALS FOR THIS QUARTER

FIRM MARKETING METRICS

MRR/ARR

Lifetime value

Profit per client

Profit per product/service

Customer Acquisition Cost

CHURN

Number of clients lost this quarter

Percentage of total clients %