

Three Ways to Tweak Your Marketing

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Even the best marketers can improve upon their existing successful campaigns and marketing messages. Minor changes in the process or format of a campaign can yield big results.

For example, sending a monthly newsletter utilizing an email marketing system that allows contacts to automatically subscribe and unsubscribe from a list is much more effective than sending a PDF newsletter attachment from Outlook which requires manually managing the contact mailing list.

There are dozens of ways you could tweak your marketing to improve results. To help you brainstorm on what these might be, here are my three recommendations to tweak your marketing for better results.

1. **Convert your blog into print collateral.** You have already spent the time and effort required to write a blog, so why not get more use out of it? Create a template in Word, Publisher or a graphic design program (e.g. Photoshop, Illustrator or InDesign) that looks like an article reprint from a magazine. Then insert each article you write into the template, creating additional marketing collateral to hand out to prospects. This enables you to tailor your introductory collateral packages to each prospect by including an article specific to their concerns.
2. **Automate your prospect and client communication.** Do you have standard communication that is sent to prospects and new clients over the first weeks and months of your relationship? If you are doing this manually, some steps may fall through the cracks. Even if each piece of communication is delivered as intended, hours of time are wasted on this manual process. Instead, utilize your Customer Relationship Management (CRM) system to automate the email communication. If you can't automate communication through your CRM, use the email auto responder feature included in most email marketing programs these days. This will enable prospects and clients to receive a set schedule of information beginning with the day they are added to the system, freeing up your time for more productive tasks.
3. **Utilize an online event registration system.** If you host client events, eliminate phone and email RSVPs and instead use an online registration system. This will enable you to gather accurate contact information from every registrant and send



prescheduled event reminders and post-event follow up emails. Using a system like this helps reduce the number of “no shows” and improves the follow-up process – both common headaches when hosting events. I recommend EventBrite.com since there is no cost to use the system for your free events and it enables you to accept payments for paid events at a nominal fee.

As you develop your 2011 marketing plan, think not only about new ways to get in front of prospects, but also about how to improve your current activities. Improving what you are already doing may be all that is needed to help you reach your client, AUM, and revenue goals.

Kristen Luke is the principal of Wealth Management Marketing, a firm dedicated to providing marketing strategies and support for Registered Investment Advisory firms. Her firm enables independent advisors the ability to market with the same quality and consistency as their larger competitors by providing the resources of an entire marketing department at a fraction of the cost of a single employee. For more information, visit www.wealthmanagementmarketing.net.

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