

fmg | Marketing Strategy

Company Name

Website

Facebook



Twitter



LinkedIn



YouTube



How much time are you willing to invest in your marketing EACH MONTH?

Less than 5 Hours

Between 5 - 15 Hours

Between 15 - 30 Hours

More than 30 Hours

Utilizing Staff Members

Outsource (ex. FMG's Do it For Me program)

How do you help clients?

What do you do better than any other advisor?

What are some of the common concerns clients come to you to help them solve?

What marketing avenue have you not tried yet and would like to explore?

Does your current website reflect the value you create for you clients?

Who do you serve?

Explain your main groups of clients: niche groups (ex. business owners, teachers), investing stage (ex. retired, nearing retirement, emerging wealth)

What are your goals?

The primary marketing goal is:

The secondary marketing goal is:

The tertiary marketing goal is:

Where do you want to maximize your efforts?

Inbound Marketing
(website, blog)

Referral Marketing

Events

Social Media

Email Marketing

Advertising

Other

How often do you plan to communicate with clients?

	Daily	Few Weekly	Weekly	Bi-Weekly	Monthly	Bi-Monthly	Quarterly	Annual	Semi-Annual	As Needed	Never
Emails											
Social Media											
Blogging											
Videos											
Podcast											
Whitepapers											
Digital Advertising											
Print Advertising											
Mailed Letters											
Other ()											

Social Media Checklist

For FACEBOOK:

Business Page is created
Profile Picture is current
Profile Cover Photo is current
About section & disclosure is current
NA

For TWITTER:

Business Page is created
Profile Picture is current
Profile Cover Photo is current
About section & disclosure is current
NA

For LINKEDIN, BUSINESS PAGE:

Business Page is created
Profile Picture is current
Profile Cover Photo is current
About section & disclosure is current
NA

For LINKEDIN, PERSONAL PAGE:

Business Page is created
Profile Picture is current
Profile Cover Photo is current
About section is current

Marketing Checklist

Website is up to date and reflects my value proposition

Social Media Profiles are integrated and have current photos

Contacts are integrated and grouped appropriately

Automated campaigns are turned on