



# DIY

## Do-It-Yourself MARKETING

### The Three Steps to Doing it Right

By Alana Schofield

**A**s a small-business owner, you're responsible for it all. You're the visionary, financial officer, sales manager, marketing executive and operations director -- and most likely wearing many other hats as well. Some advisors are fortunate to have assistance along the way, but if a business busts, the failure will almost always fall on the owner's shoulders.

So how do you stay on top and get ahead when it comes to marketing your insurance or financial advisory firm? Unfortunately, unlike with accounting, there is no ready-made software program that incorporates it all, nor is there a one-size-fits-all standardized marketing system that applies to any small business. Marketing is relative to an owner's specific strengths, service offerings, areas of expertise and budget. Although you do not have a standardized system available, you can use an organized and proven approach.

The approach to do-it-yourself marketing can be categorized and broken down into a three-step process: Define, support and promote. Although it's up to you to fill in the blanks for each, the approach can be applied to a new advertising concept, a public relations campaign, an event or even development of a brand for your advisory firm.

Effective marketing begins with defining the unique identity and purpose of what you're marketing, followed by creating the material and systems to support that purpose, then promoting the concept, event or company. Following this order, you will maximize the return on your marketing

investment and accomplish the "stickiness" of your marketing messages.

Ready, set, go ... Here is the approach to the "do-it-yourself marketing" of your insurance or financial advisory firm...

#### Define

Before you embark on any marketing plan, it's important to become very clear about your purpose. It all starts with defining the identity of what you are marketing. For example, when it comes to your firm, ask yourself: What do I do? Whom do I do it for? Why am I better? What's our competitive advantage? What are our areas of specialty? What problems do our services solve? What do I want my prospects to think when they hear about my company? Use the answers to create your messages — the headlines that will appeal most to your target audience. This will create the "purpose" of your marketing. Be sure to stick to these key messages in all your marketing initiatives. Messaging was an effective tool for our new president while campaigning. The country was clear that he was bringing "change" to America. If you stick to the messages, your messages will stick.

#### Support

Next, once your ideal identity is defined and your messages are set, it is important that you support your "purpose" through developing related marketing collateral, promotion concepts and systems -- while being consistent with the messaging. You have only one chance to make a first impression. If you tout yourself as the IRA rollover expert or the "income for life" planning specialist in your community but have nothing

to support your claim, the credibility of that statement is diminished. By developing supporting materials and systems upfront, you are ensuring that you reaffirm that you are the expert on the topic, that prospective clients have an opportunity to learn more about you and the problems you solve, and that you have a nonthreatening method to contact your insurance or financial advisory firm for more information.

Examples of supporting collateral include company- and/or service-specific marketing brochures, a Web site, a sales kit, workshop materials, a professional biography and a media kit. If you are conducting a special promotion showcasing your expertise, create items of interest for your prospects. In this example, if you are gathering leads by driving prospective clients to your Web site, consider having a downloadable document titled "10 Most Common Mistakes Made When Rolling Over Your 401(k) or IRA" or "A Guide to Figuring Your Income Needs in Retirement." Not only does this instill credibility in the minds of these prospective clients but your document becomes a research tool and names you as the expert to consult.

When conducting an integrated marketing campaign, create a platform to collect the leads as well as systems to track where leads come from. Understanding where your new business derives will lead to more targeted and effective promotions in the future and most likely at a lesser budget.

It's important to develop your marketing materials with purpose, as you need to not just tell but also sell your story.

Clarify for your readers why you're better than anyone else in your community and why they should take note.

**Promote**

And last, once the brand is defined and the supporting materials are in place, it's time to actively promote the brand. The key to setting yourself apart is to create an awareness of yourself and your services. But there is a big difference between just being seen in your community and actually being heard by your community and your target prospects. Consistent messages combined with targeted marketing efforts can lead to a memorable brand.

Traditional strategies for promoting your insurance or financial advisory firm can include print, TV, radio and even outdoor advertising, as well as

direct mail, marketing and public relations campaigns. The term "new-media strategies" refers to Web marketing and the methods for driving people to your Web site, where they can further learn from and interact with your company.

Generally, traditional advertising creates exposure and is best used as a branding technique. Public relations also creates exposure and increases credibility. Direct mail can be used as a branding tool as well as a call to action. And marketing strategies such as network marketing can do the same, as long as materials are structured accordingly. New media increases your Web traffic, giving you an opportunity to "wow!" and engage your prospective clients once they reach your Web site.

A strong, well-orchestrated marketing approach offers you the ability to break

through the clutter of other insurance or financial advisory competitors in your community and get more return from your marketing dollars. Conducting these steps out of order will dilute the impact of your marketing budget, send mixed messages to your community and increase the cost of securing each new client.

Ready, set, go... Apply this approach to the DIY marketing of your insurance or financial advisory firm, and get on the fast track to success. **INN**

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