

MARKETING MASTERSHIP

**WEEK 5: EXPAND YOUR LEAD GENERATION PLAN
TO ATTRACT MORE, HIGH QUALITY LEADS**

TODAY'S FOCUS:

Extend out from your brand to max out your return on effort.

How to leverage partnerships to accelerate your growth.

THE 4 WAYS TO INCREASE REVENUE OPPORTUNITIES:

1. Attract **More, Higher Quality** Leads

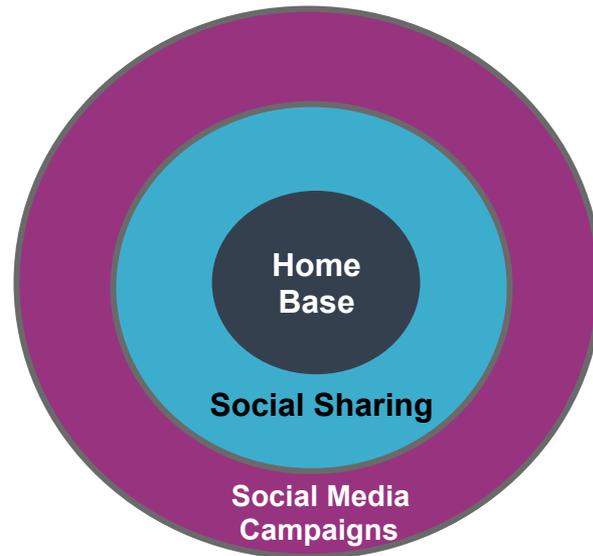
- Better-suited people
- More volume* overall

* Volume is relative. You're not an online retailer.

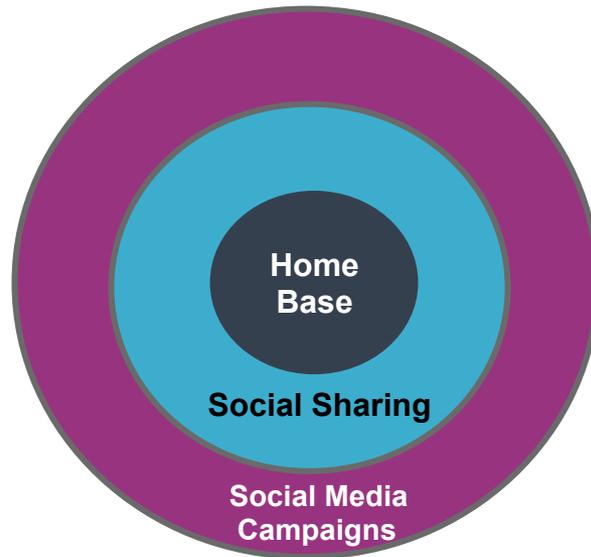
YOU MUST FOLLOW A

**MARKETING
SYSTEM.**

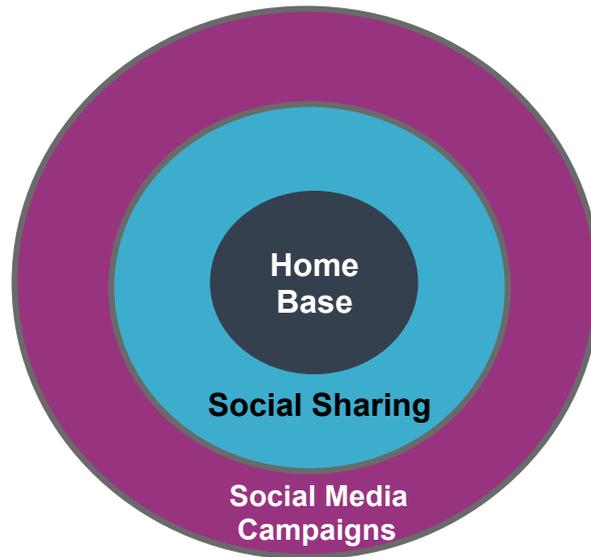
WE TALKED ABOUT HOW TO LEVERAGE YOUR CONTENT...



...WITHIN YOUR SPHERE OF INFLUENCE...



...WITHIN YOUR SPHERE OF INFLUENCE...



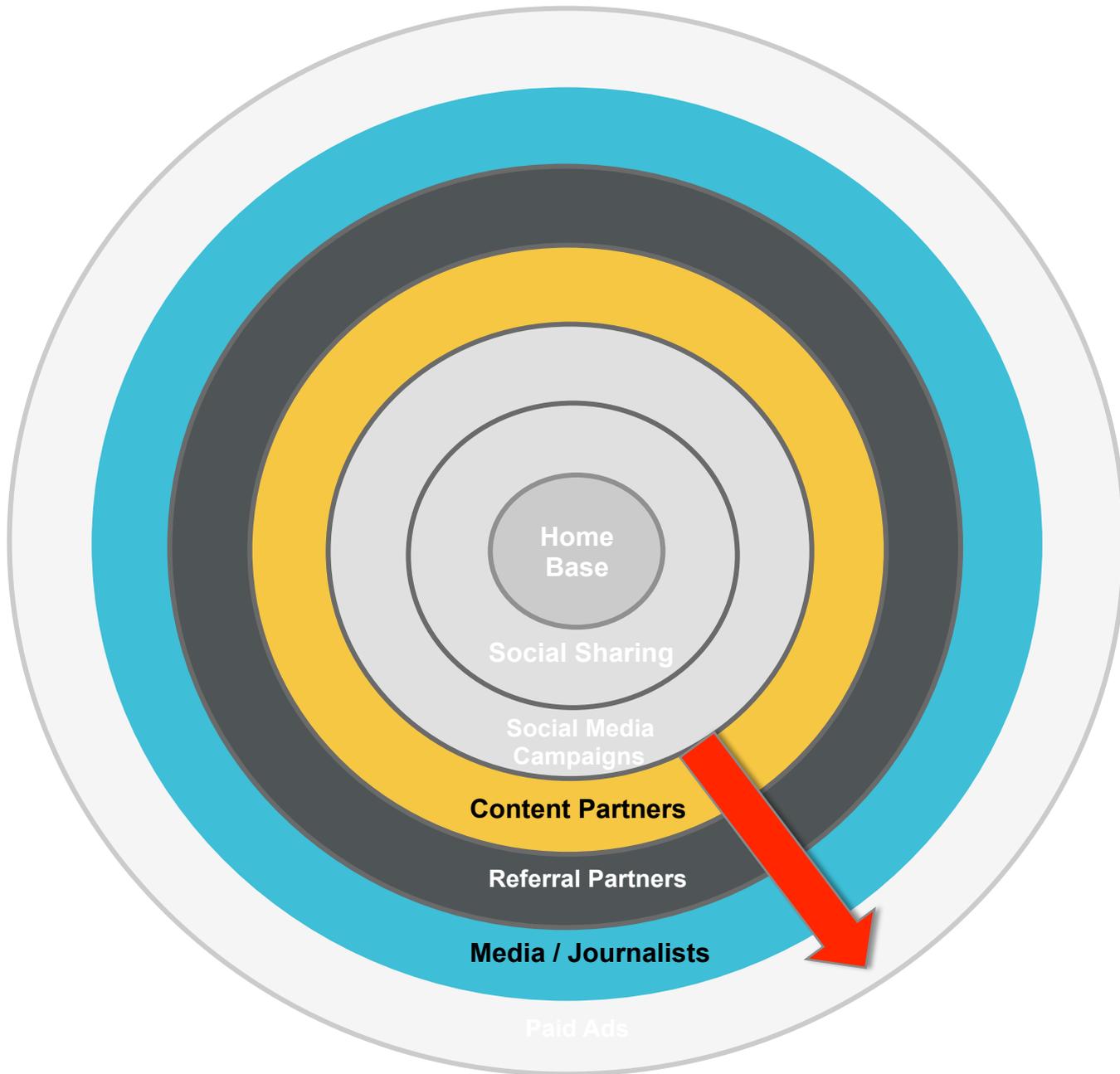
...TO REINFORCE YOUR MESSAGE TO YOUR LIST & FOLLOWERS.

**THE RESULT: YOU ATTRACT NEW
FOLLOWERS AND PEOPLE TO YOUR
LIST.**

**THE RESULT: YOU ATTRACT NEW
FOLLOWERS AND PEOPLE TO YOUR
LIST...SLOWLY.**

IF YOU STOP HERE, YOU LIMIT YOUR GROWTH TO YOUR NARROW INFLUENCE.





YOU WANT TO EXPAND THE REACH OF YOUR BRAND

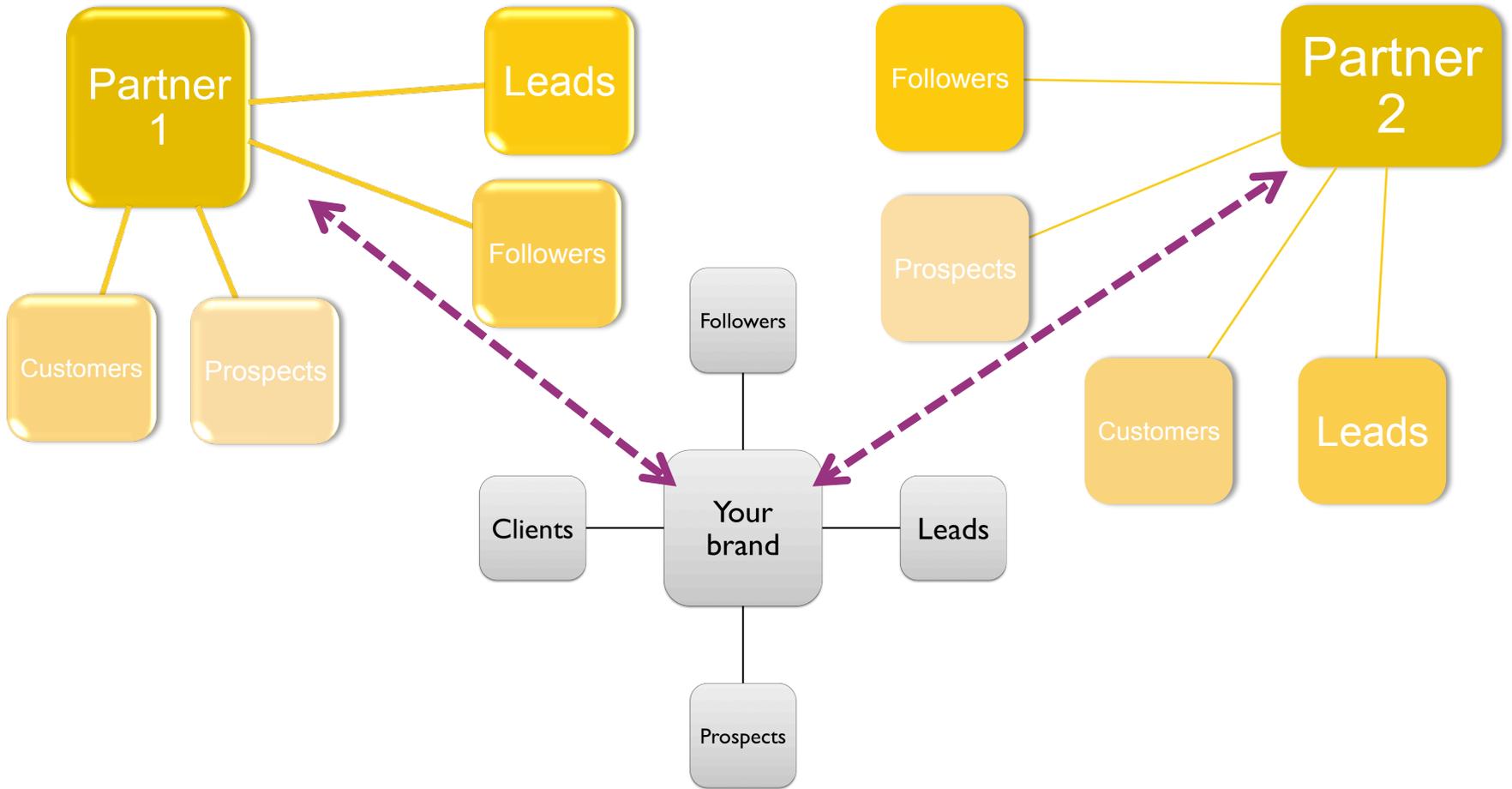


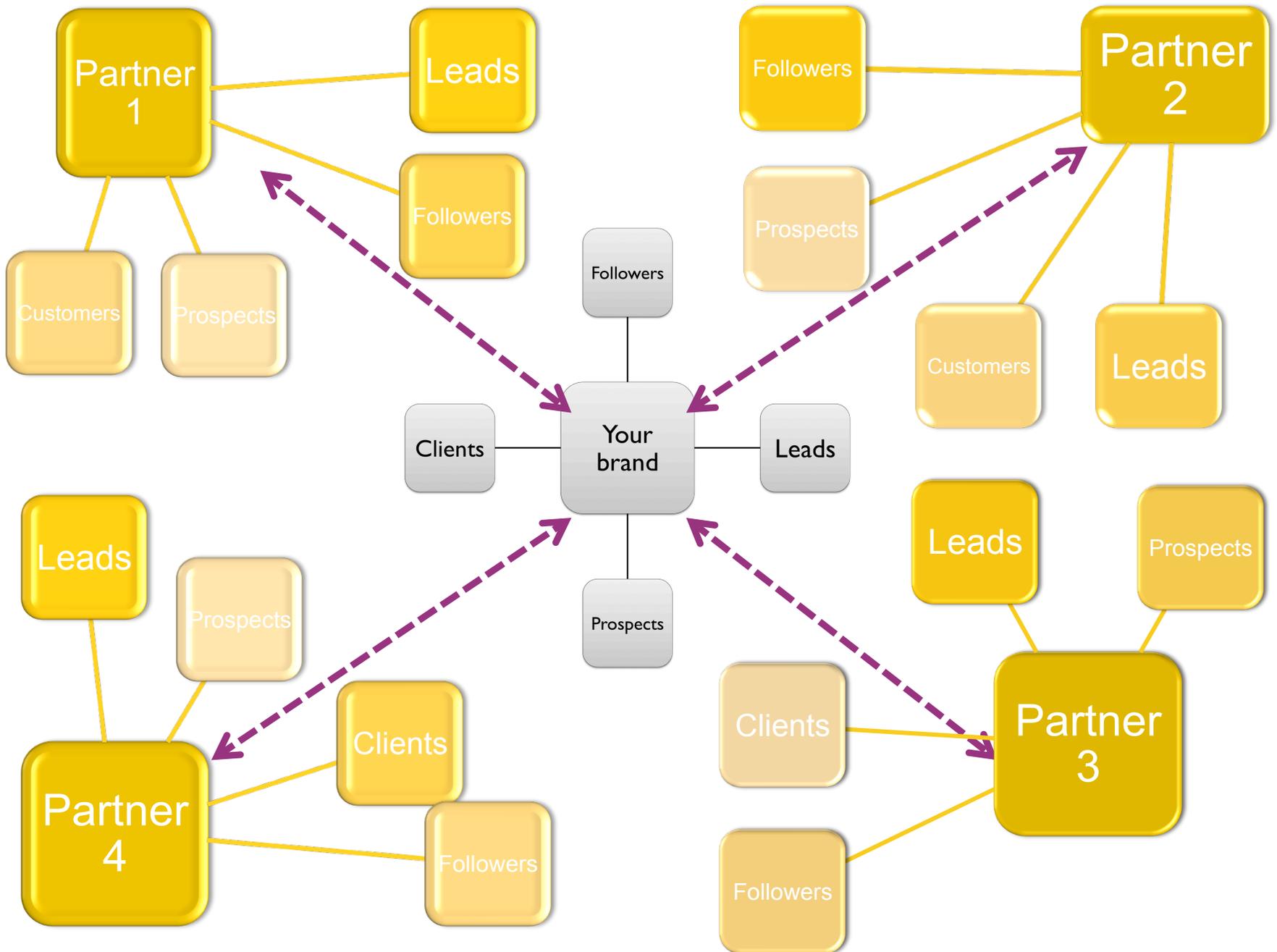
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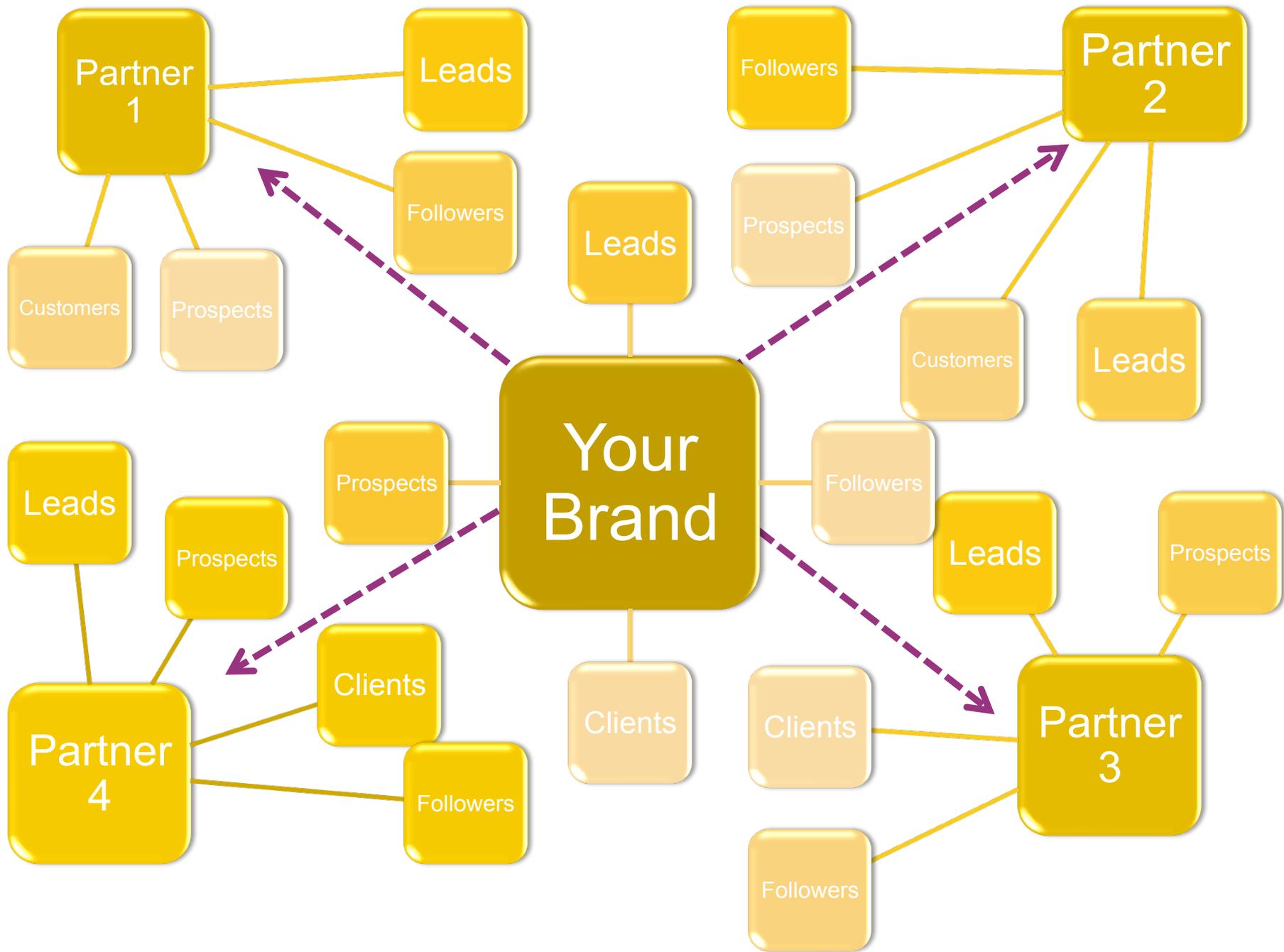


BY FORMING STRATEGIC PARTNERSHIPS.









IT'S ALL ABOUT LEVERAGE:

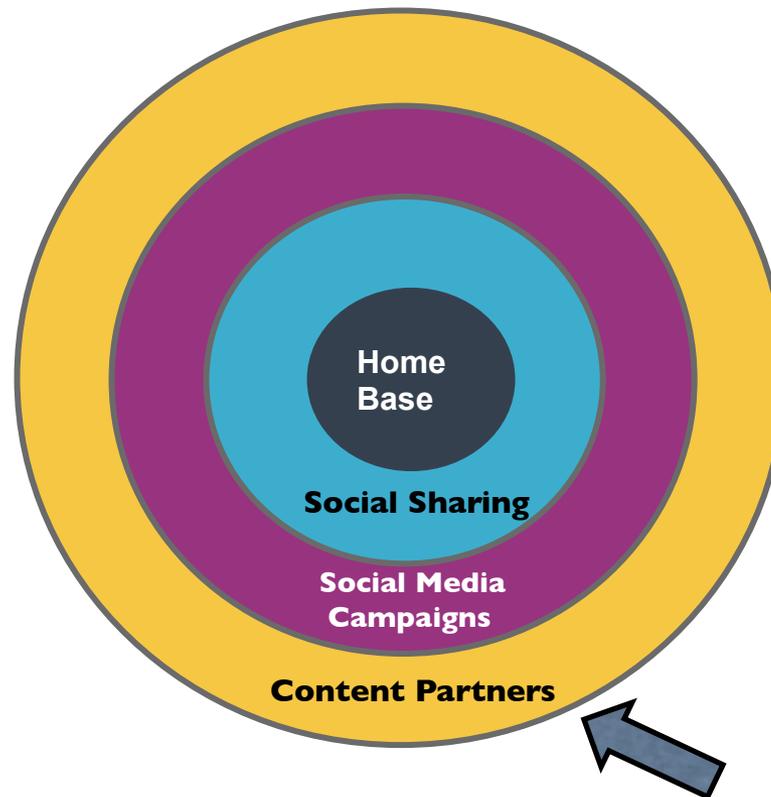
- **leverage** what you've already created:
 - your content, your brand, your experience
- **leverage the trusted relationship your partners already have with *their* audience...**

so you can...**gain the attention of an engaged group of people in the place where they are already comfortable...**

3 TYPES OF STRATEGIC PARTNERS TO ACCELERATE GROWTH

1. Content Partners
2. Referral Partners
3. Media Partners

1. CONTENT PARTNERS



CONTENT PARTNERS

Based on the premise that “collaboration” is better than going it alone. $1+1=3$

- You do not have to create all of your content yourself.
- You do not have to share your content only through your brand channels.

COLLABORATION

Where do we see this all the time?

COLLABORATION

Where do we see this all the time?

The music industry!

COLLABORATION

Where do we see this all the time?

The music industry!

Nearly every song is a 'COLLAB.'

- Ed Sheeran – teams with Taylor Swift, Macklemore & Ryan Lewis, Beyonce, the list goes on...
- DJ Khaled feat. Justin Bieber, Quavo, Chance the Rapper & Lil Wayne, "I'm the One"
- “Bang, Bang” - Ariana Grande, Nicki Minaj, Jessie J
- “Wolves” – Selena Gomez & Marshmello

CONTENT PARTNERS

- What **knowledge gaps** can you seek to fill with a partner's expertise?
- Who has a **content platform** where you would want to share your content?
- Who offers expertise that is **appealing** to your audience?
- What **topics** would your audience be most interested in learning?
- Who do you **want to team up** with to teach, entertain and inspire?

4 STEP FORMULA TO SECURE CONTENT PARTNERS

1. Identify your High Value Hyper Target.

4 STEP FORMULA TO SECURE CONTENT PARTNERS

1. Identify your High Value Hyper Target.
2. Identify **possible partners** who also serve or reach that audience.
 - Do your homework...partnership implies endorsement

FIND:

- **Organizations**
- **Groups**
- **Professionals**
- **Clubs**
- **Retail Outlets**
- **Blogs**
- **You Tube ‘celebs’**
- **Podcast hosts**
- **Newsletters, local or targeted magazines**
- **Health, Beauty & Fitness Experts**
- **Coaches**
- **Companies**
- **Trade Shows**
- **Service Providers**
- **Speakers/Authors**

WHO ALREADY HAVE A:

- Readership
- Mailing List
- Viewing Audience
- Listening Audience
- Customer Base
- Membership
- Following

similar to your

High Value Hyper Target

4 STEP FORMULA TO SECURE CONTENT PARTNERS

1. Identify your High Value Hyper Target.
2. Identify **possible partners** who also serve or reach that audience.
 - Do your homework...partnership implies endorsement
3. Pinpoint content sharing **opportunities**.

WHERE CAN YOU ADD VALUE WITH YOUR CONTENT?

- Provide blog post
- Be a podcast guest
- Give a workshop for their members
- Speak at their conference
- Host a joint event
- Hold an event at their location
- Answer questions in online forum
- Share a tool, template, or ebook they can use as Member Benefit

BE THOROUGH IN YOUR RESEARCH

While you're researching, note:

- Do they have a lead magnet on their site?
- How current / active is their blog/podcast/videos?
- Do they offer a newsletter?
- Facebook Page (like it!) - custom audience

Advertising opportunities

E-mailing / mailing (list)

Sponsorship

Resource List or Recommended Links

4 STEP FORMULA TO SECURE CONTENT PARTNERS

1. Identify your High Value Hyper Target.
2. Identify **possible partners** who also serve or reach that audience.
 - Do your homework...partnership implies endorsement
3. Pinpoint content sharing **opportunities**.
4. Launch a **campaign**.

To systematize the outreach, create and launch a content partnership campaign that you can use repeat to scale your effort.

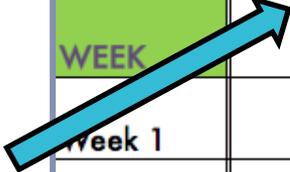
Example: You want to expand your reach by publishing content on blogs your target audience reads.

LEVERAGE YOUR EFFORT

- Identify **5-10 blogs** that have a following made up of your target audience.
- You are going to **reach out over 6-8 weeks** to this first group of potential partners in a systematized way.
- Your goal is to **make it easy** for them to say **“yes!”** when you demonstrate you understand their audience and **provide content that serves** them.

WARM UP BY COMMENTING FOR 3 WEEKS

	BLOG COMMENTS	GUEST BLOG POSTS
WEEK		
Week 1	5 Blogs	
Week 2	5 Blogs	
Week 3	5 Blogs	
Week 4	5 Blogs	CAMPAIGN TO TARGET AUDIENCE BLOGS WITH CONTENT IDEAS
Week 5	5 Blogs	
Week 6	5 Blogs	
Week 7	5 Blogs	



THEN CONTACT THE BLOGGER DIRECTLY...

	BLOG COMMENTS	GUEST BLOG POSTS
WEEK		
Week 1	5 Blogs	
Week 2	5 Blogs	
Week 3	5 Blogs	
Week 4	5 Blogs	CAMPAIGN TO TARGET AUDIENCE BLOGS WITH CONTENT IDEAS
Week 5	5 Blogs	
Week 6	5 Blogs	
Week 7	5 Blogs	



THE CAMPAIGN FLOW

- **Introduce** yourself & the audience you serve
- **Invite** the blogger to share an article on your blog
- Include **Sample Blog Topics** (at least **3 ideas**) in your first contact...
- Follow-up with a **sample blog post** of one of the ideas...
- Follow-up with a **call-to-action**...
- “Would you like to use it?”
- **Follow-up** 1-2 more times.
- Include a deadline for use of your post

While some blogs publish the content you send, others may reply with a different kind of opportunity.

THE CAMPAIGN OPENS THE DOOR!

PRO TIP: HELP FIRST, THEN ASK

How can you provide value to this partner and showcase their expertise?

- Interview key person for a webinar or transcribe an interview into blog post
- Invite them to:
 - share a blog post
 - be a podcast guest
 - do a facebook live video with you
 - present a webinar

The Independent Advisor's
IMPLEMENT NOW
 PRACTICE MANAGEMENT VIRTUAL SUMMIT

MARCH 14-18, 2016



Hosted by Kristin Harad



Bill Winterberg



Jennifer Goldman



Aaron Klein



Sheryl Garrett



Peter Renton



Michael Kitces



Cathy Curtis



Ryan Russell



Stephanie Sammons



Steve Schueth



Shuang Chen



Jay Palter



Ronald Sier



Brett Davidson



Peter Lord



David Mehlhorn

The Independent Advisor's
IMPLEMENT NOW
 PRACTICE MANAGEMENT VIRTUAL SUMMIT
 MARCH 16-20, 2015



Hosted by Kristin Harad



Michael Kitces



Carl Richards



Julie Littlechild

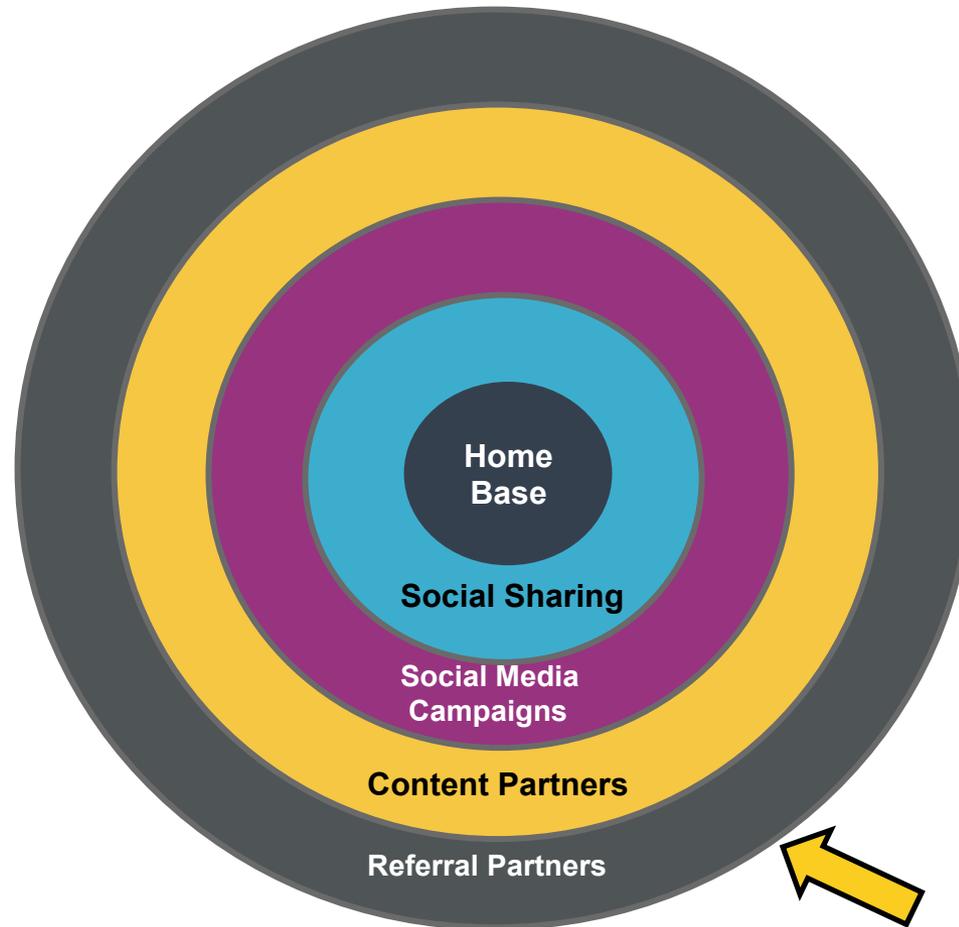


Blane Warrene

THE INDEPENDENT ADVISOR'S
IMPLEMENT NOW! Practice Management Telesummit
 March 17-21, 2014

Amy Mellwain	Bill Winterberg	Kristen Luke	Loic Jeanjean	Jennifer Goldman	Michael Kitces	Sheryl Garrett
Tony Vidler	Susan Weiner	Alan Moore	Angie Herbers	Brent Carnduff	Ginny Hudgens	David Mehlhorn
Marie Swift	Steve Worsching	Cindi Hill	Caleb Brown	Stephanie Sammons	Dave Grant	John Prendergast

2. REFERRAL PARTNERS



3 ESSENTIAL CHARACTERISTICS OF REFERRAL PARTNERS

1. Offers a **service** your ideal client needs, values, or wants.
2. Attracts a **similar target client** and understands and **appreciates** the audience.
3. Demonstrates **marketing savvy** and **motivation** to grow so the partnership can flourish over time.

SAY 'NO' MORE OFTEN THAN 'YES.'

- Not all partnerships are created equal
- Just because someone invites you for coffee or wants you to come to a networking event, you do not have to say yes.
- You should be saying no most of the time.

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To help guide your answer you can develop a **partnership hierarchy**.

PARTNERSHIP HIERARCHY

This hierarchy can be used for any kind of partnership

It is **ESSENTIAL** when it comes to Referral Partners, because they can be the biggest time wasters.

What is it?

- A **prioritization** that you or a team member assigns to every potential partner who contacts you
- A **ranking** for every potential partner you consider reaching out to

...so you can allocate your resources **with intention** and focus on the relationships that will be **most valuable**.

**USE THE 3-TIER METHOD
TO BUILD YOUR
REFERRAL PARTNER
HIERARCHY.**

TIER 1 PARTNERS

- ✓ are **mutually committed** to helping each other grow and expand your respective businesses.
- ✓ have the **same primary target audience** and complementary services that can support each other's clients.
- ✓ can provide each other **referrals with ease**, multiple times a year.
- ✓ are few in number, but you devote the **majority of your partnership effort** here.

DO YOU GET WOUND UP ABOUT MONEY?



Then come **UNWIND.**
EXCLUSIVELY FOR PARENTS

You're Invited to an engaging and educational evening with complimentary wine and hors d'oeuvres with certified financial planner and attorney **Thea Beatie Eliot**.

Relax, unwind and get to your questions like:

- How do I stop worrying and spend without feeling guilty?
- How do I plan for the future?
- How much estate planning?
- How do we choose a guardian?

Bring Your Spouse
Make It A Date Night

Go

VitaVie
Financial Planning

UNWIND!
UNWIND! Kitchen and Back Bar
is a trendy new Union Street restaurant featured on the Food Network's "The Opener".

Admission to this event is \$25 but **FREE** via this form. Space is **VERY** limited. Please reserve

Finally! Good News for Parents

Make just a few smart moves to take charge of your finances now.



Kristin



Thea

Coming together for **ONE WEEKEND ONLY**, two financial professionals and local moms offer **FREE WORKSHOPS** to teach parents how to bring stability and security to their personal finances during a tumultuous time.

Join Certified Financial Planner™ Kristin Harad and attorney Thea Beatie Eliot and learn how, while times may be hard globally, they do not have to be hard for you personally.

In challenging economic times, there are many things we cannot control. That's why you need to focus on what you can control. These free workshops will show you **HOW TO TAKE CHARGE OF YOUR FINANCES, GET YOUR FINANCIAL HOUSE IN ORDER** and **PROTECT YOUR FAMILY AND YOUR KIDS NO MATTER**

WOUND UP ABOUT YOUR FINANCES?



Thursday, October 7th, 7:00 - 9:00 pm

TIER 2 PARTNERS

- ✓ Your **solid connections** who have the occasional referral
- ✓ They offer **valuable services** that you will call upon for clients in the right situation.

You connect with **Tier 2 partners** with **modest regularity**, but do not carve out large blocks of your time and energy for them.

TIER 3 PARTNERS

- ✓ These are your **casual or loose** connections who often reach out to you to meet.
- ✓ You would **rarely initiate** a **Tier 3 relationship** unless you had a specific need or value this person's perspective on a distinct topic .
- ✓ **Do not spend more time here** than you need to. Defer to quick phone calls rather than in-person meet-ups.

BE PROACTIVE

- Decide in advance what kind of partners you desire.
- Reach out to potential Tier 1 Partners who fit your criteria.

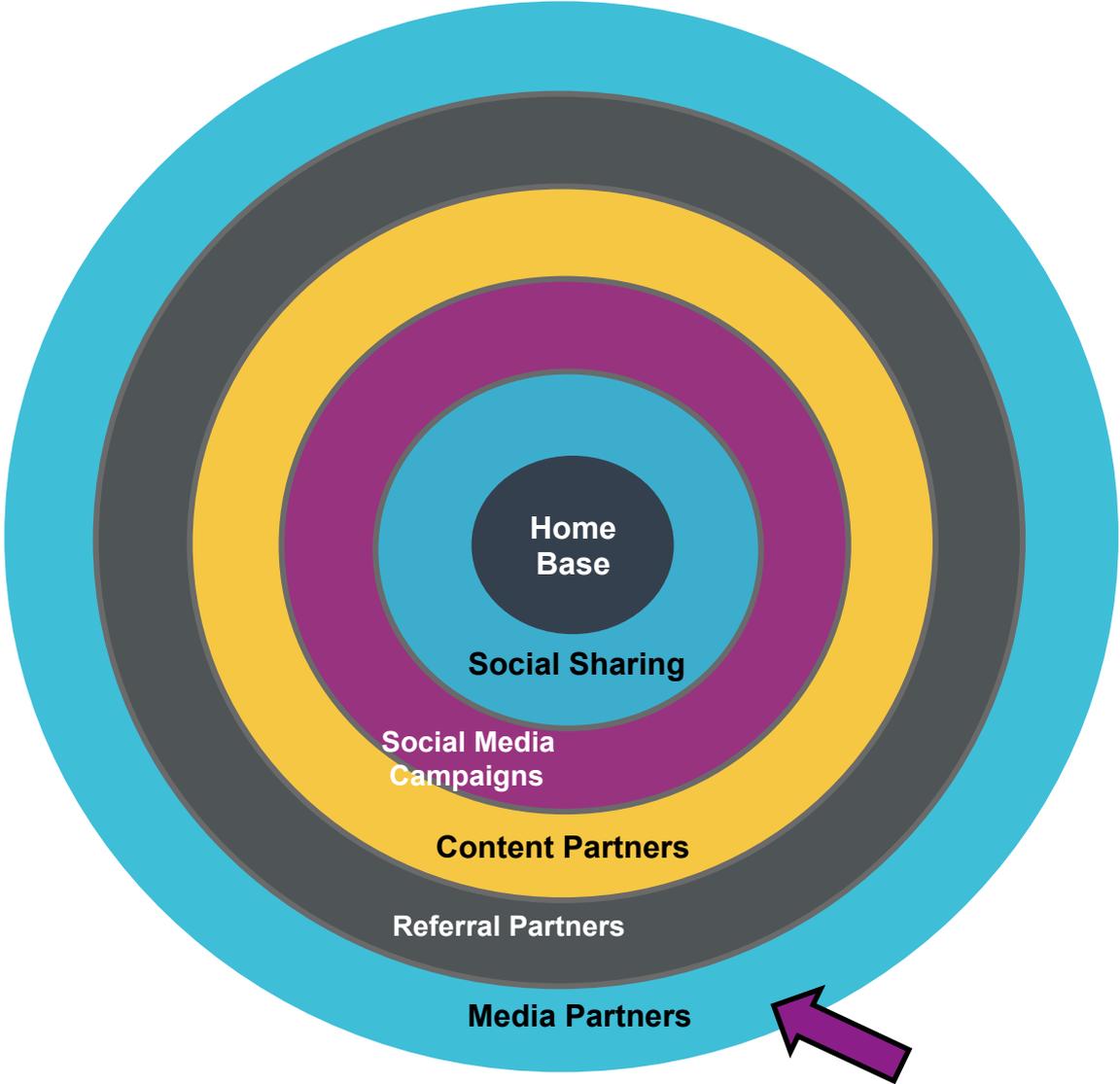
BE PROACTIVE

- Decide in advance what kind of partners you desire.
- Reach out to potential Tier 1 Partners who fit your criteria.
- Be prepared when you meet with them:

HAVE AN AGENDA

- Set an objective and desired outcome – reiterate this info upfront
- Outline the congruencies you notice; ask about others
- Outline opportunity of working together (with desired outcome in mind)
- Be clear on your call to action
- **What** specifically can you do to help the partner and **by when** will you?
- **What** specifically do you want that person to do for you & **by when**?

3. MEDIA PARTNERS



MEDIA OUTLETS AND THEIR JOURNALISTS

You may not consider media outlets as partners, but they have **incredibly loyal** readers, viewers, and followers.

When you contribute your expertise to their story you reap the benefits of contributing through a **respected independent** source.

BENEFITS OF EXPOSURE:

- Implied **endorsement** of your expert status
- Expanded **reach and exposure** to the right people.
- Improved **search engine** results from appearing

Your Financial Connection

Financial Planning When You Want It All

Are You Cultivating Wealth? Take Our Quiz to Rate Yourself!

[Take the Quiz](#)

As seen in



Once you're **helpful** and willing to talk with a journalist or **direct them** to a better contact --- you'll be a "**reliable source**" and get repeat calls.



BUT WHAT DO THEY GET?

You hold up your side of the partnership by **helping them deliver the best story** to their followers.

Respect the story.

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Respect the story. Follow these rules:

BUT WHAT DO THEY GET?

You hold up your side of the partnership by **helping them deliver the best story** to their followers.

Respect the story. Follow these rules:

1. Don't waste their time: Collect your thoughts – schedule a time to talk.
2. Offer up your expertise in digestible sound bites / layman's language.
3. Provide your expertise to serve their audience
 - **Support** their story, not your agenda
4. Be sure to **share resources**, especially if they are an even better fit
5. Have an opinion
6. Say, "Thank You!"

SPREAD THE NEWS!

- When a story airs or is published, add it to your [content calendar](#) right away!
- Share through [social media](#) with context about the topic in the summary and tag author or publication / outlet where possible.
- Feel free to [repeat](#) the share a few times on Twitter and [recycle](#) it back on Facebook & LinkedIn about 3 & 6 weeks later, too.
- [Email the link](#) to your list (prospects & clients), with a short introduction of the issue in the story and a lead in to your contribution.
- In the media or press section of your web site (or find another place to house it), [add a link to the story](#) with the logo (if permissible).

BE PROACTIVE!

If media is a top priority for your marketing plan, then you can create a campaign to reach journalists.

YOU WANT TO **SYSTEMATIZE OUTREACH** SO YOU OR A TEAM MEMBER CAN MAKE THE MOST OF YOUR RESOURCES...



IN communities and MEDIA outlets		Media / PR	
/engage with others	Review & Respond HARO list & NAPFA	Respond to 5-10 Journalist Blogs/articles	Check Journalists' Twitter Feed
/engage with others	Review & Respond HARO list	Respond to 5-10 Journalist Blogs/articles	Check Journalists' Twitter Feed
/engage with others	Review & Respond HARO list	Respond to 5-10 Journalist Blogs/articles	Check Journalists' Twitter Feed
/engage with others	Review & Respond HARO list	Respond to 5-10 Journalist Blogs/articles	Check Journalists' Twitter Feed
/engage with others	Review & Respond HARO list	Campaign to Journalists with intro and specialty areas	Check Journalists' Twitter Feed
/engage with others	Review & Respond HARO list		Check Journalists' Twitter Feed
/engage with others	Review & Respond HARO list		Check Journalists' Twitter Feed
/engage with others	Review & Respond HARO list		Check Journalists' Twitter Feed
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/engage with others	Review & Respond HARO list		Check Journalists' Twitter Feed

Identify **5-10 journalists** who contribute to media outlets with the **same target client**.

Pro Tip: Go Local First!



Jason Scott

@JScottJournal

Business reporter for @CPBJ covering the #Harrisburg area. I tweet mostly work-related links about #RE #construction #craftbeer #pagovt. Email: jscott@cpbj.com

📍 Harrisburg, PA

🔗 cpbj.com

📅 Joined June 2011

+ Tweet to Jason Scott



Katherine Knott

@Knott_Katherine

Education Reporter @NEHeadlines. I go into the weeds so you don't have to #MizzouMade | Formerly @chronicle & @kcstar | kknott@thenewsenterprise.com

📍 Elizabethtown, KY

🔗 fb.me/knottkatherine

📅 Joined November 2010

🕒 Born on December 03

+ Tweet to

✉ Message



Kathleen Pender

@KathPender

I write the Net Worth personal finance and investing column in the San Francisco Chronicle and Net Worth Plus blog at SFGate.

📍 San Francisco

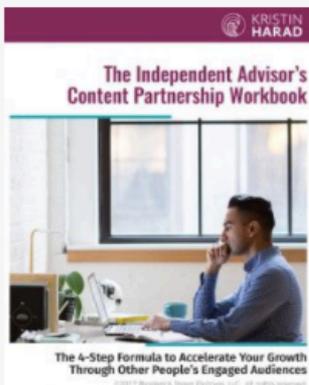
🔗 sfgate.com/columns/networ...

🕒 Joined June 2011

DO YOUR HOMEWORK

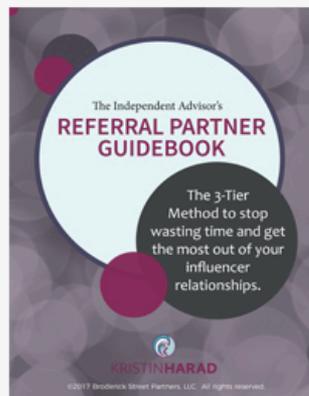
- ✓ Know what journalists write or report:
 - Follow them on Twitter
 - Comment on their blogs, articles or videos for 2-4 weeks before reaching out
- ✓ Introduce yourself in a **brief** email
 - Provide 3 **specific** areas where you can be a resource.
 - Tailor to their specific BEAT. Do not be generic!

Content Partnerships



The Independent Advisor's Content Partnership Workbook – [PDF](#) (Click to download)

Referral Partnerships



The Independent Advisor's Referral Partnership Guidebook – [PDF](#) (Click to download)

Media Partnerships



Explode Your Media Exposure Tip Sheet – [PDF](#) (Click to download)

Tools & Templates

- Your Partner Assessment Checklist – [PDF](#) (Click to download)
- Your Complete Partnership Tracker Excel Workbook – [XLS](#)
- Tier 1 Partnership Request Sample Letter – [PDF](#) | [Doc](#) (Click to download)

ACTION ITEMS

- Decide **when** you want to start reaching out to content partners.
- Determine the **kind of content sharing** you want to pursue.
- Decide if pursuing **referral partners** is part of your plan. If yes, outline the Tier 1 criteria.
- Make a list of **5 Tier 1 partners** to reach out to (and set up meetings).
- Is **media** a top priority? When will you start your campaign? What are the topics you want to be known for?
 - **Schedule your media outreach** in your marketing plan.
 - **Identify the journalists** you want to reach.