



PERSONAL BRANDING

“Sure, you sell investment products and financial planning, but the truth is you are in the business of selling yourself.”

Articulate your brand through your actions

At this point, you have defined your ideal client and created a pitch that tells the world who they are and what you can do for them. Now it's time to develop a plan to put your brand in motion.

In this worksheet, you will develop strategies for communicating your brand through specific actions that reinforce your connection to high-value clients. This will be your marketing plan and is the vehicle for demonstrating your personal brand.



Before you start this worksheet, make sure that you have watched the previous two videos and completed the corresponding worksheets. Then view the Step 3 companion video, “Live Your Brand.”

1. An effective marketing plan:

A marketing plan is not a seminar series at your office or an invitation to a financial planning session at the company headquarters. It is the strategy that connects you with ideal clients in ways that are relevant to them. An effective marketing plan consists of tactics that showcase your brand in the best possible light to your preferred clients.

2. Make sure that your plan is genuine:

Be realistic. Just because the advisor in the next office is having success getting clients on the golf course, doesn't mean that you will. You may not even like golf. In fact, your ideal client may not like golf. Most importantly, you must define touch-points of common interest between you and your ideal client and base your strategies around them. That way, you can demonstrate your personal brand ... without ever leaving your comfort zone.

3. Put your plan into action:

Are you marketing yourself to restaurant owners? You might want to think about joining the local restaurant association. Do you love cooking? Organize a cooking class and invite existing clients and their friends and family members.

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Making connections with other people has everything to do with what you share in common.

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4. A word about getting referrals:

Instead of limiting your professional referral sources to attorneys and accountants, think about other possibilities. If you want to market to women raising young children, stand in their shoes and imagine the kinds of professionals they need to access within a trusted network. Do you know a decorator? A do-it-yourself playroom remodeling class might open some doors. The owner of the local Pre-K may be looking for the same ideal client. I'll bet she gets a lot fewer lunch invitations from financial advisors than your CPA does!

5. Connect with your ideal:

In this exercise, you need a **blank sheet of paper** and your previous two worksheets. Start by drawing a circle in the middle of the page and write the description of your ideal client inside it. This will remind you to keep that client central to your plan. Next, start brainstorming for strategies that will connect you with that client (see diagram below).

Examples may include hosting events, networking with other professionals, leveraging volunteer or philanthropic services associated with common interests, or joining related trade organizations. List at least five strategies.

Once you have charted your marketing strategies into this diagram, you're ready to formalize your plan.

Consolidate your findings from the first three worksheets into your 3-step master marketing plan. This will be your reference tool to help you stay on track. You can also modify it as needed.



Next: Wash, rinse, repeat

Once you have completed the first three steps of the program, you have the framework of a real marketing plan. Now let's focus on perfecting it!

Visit thetrueprogram.com for Judi's blogs, videos, and other tips and tools to build and improve your plan.

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