The Bill Good Marketing® Two-Year Marketing Plan

A Supplement to the Bill Good Marketing System® Proposal

White Paper

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MARKETING

Marketing can be broken into three basic principals:

1. Message
2. List
3. Timing

If you can master these three elements you can master marketing. Just like the martial arts student who must test with their instructor, you must test your skills before you can advance to the level of master.

MARKETING:
1. The act or process of buying and selling in a market.
2. The commercial functions involved in transferring goods from producer to consumer.
3. The act or business of promoting sales of a product, as by advertising or packaging.*

This report will not make you a marketing master. And frankly, you don't want to become a marketing master. Surely, you want to continue the work you are paid to do. If you are a financial advisor—advise. If you are an AVON® salesperson—sell.

Leave the Marketing to the Professionals

The easiest of these elements is the message. Everyone has a good idea from time to time. Whether a catchy slogan, a pithy jingle or an innovative logo, good ideas are a dime a dozen.

The fulfillment, or completion, of a good idea is marketing. Without fulfillment, you may have just another million-dollar idea that goes nowhere.

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MESSAGE: The message is the good idea that will produce the results you want. And again, anyone can come up with a good idea.

But the message is also all the substance of the communication. While a good set of words is important, the envelope, postage, stationary, paper type and color, font sizes, headlines, "P.S.", Highlights, sticky notes attached, staples, pictures and graphics, return address, text color, signature, etc. are also very important—for a letter.

Faxes and Emails have their own factors to be considered. Equally as important as the words are the other factors of those types of messages.

> **MESSAGE:**
> **1. a. A usually short communication transmitted by words, signals, or other means from one person, station, or group to another.**
> **b. The substance of such a communication; the point or points conveyed: *gestured to a waiter, who got the message and brought the bill.***
> 2. A statement made or read before a gathering: *a retiring coach's farewell message.*
> 3. A basic thesis or lesson; a moral: *a play with a message*.*

The Manipulation of the factors is "Mutilation"

One of our clients swears that he used to do this. D.B. would take his entire mailing, scatter it in the parking lot and *drive* over it. That's right—he would drive over the letters leaving tire marks and ground in dirt on the envelope. Then he would take a stamp and in red ink he would stamp "DON'T THROW THIS AWAY—AGAIN!"

Do you think his mail was opened and read? You bet it was!

A great idea that reached fulfillment, but without his dedication to the idea of modifying his message through mutilation he would just be sending another letter.

So in addition to our 2000+ letters in our Letter's Library® we help our clients decide other factors in their mutilation strategy.

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LIST: One of the most important pre-qualifying elements you can employ is an accurate list of individuals who have been selected to match your ideal clients. There are several criteria that may be included or excluded when ordering any list.

Income, home value, family size, occupation, location, hobbies, education level, retirement status and practically any other criterion you can imagine can be used to send targeted pieces of mail. If anyone anywhere has ever made a similar list before, it can be either recreated or purchased.

> **LIST:**
> 1. **A series of names, words, or other items written, printed, or imagined one after the other: *a shopping list; a guest list; a list of things to do*.**
> 2. A considerable number; a long series: *recited a list of dates memorized*.*

* *The American Heritage® college dictionary, Fourth Edition. Copyright © 2004, 2000 by Houghton Mifflin Company. Published by Houghton Mifflin Company. Pg. 560*

The old fishbowl in the restaurant technique is still effective even though pretty much everyone knows exactly what happens to those cards. The phonebook is also a source albeit not the most exclusive list you will come across.

The Basic Laws of Lists

The easier a list is to get, the more advisors have it, and the less likely it is to be any good. Conversely, the harder a list is to get, the fewer advisors will have it, and the better it is likely to be. This list takes some effort to obtain and, therefore, not many advisors will get it.

You will pay for a list in time or in dollars; it will cost you. However, particularly in direct mail, the better the list the better the savings in postage and raw materials.

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TIMING: This is the most elusive of the three elements of marketing. Half of timing is experience; the other half is **LUCK**.

For the luck consider a horseshoe, 4-leaf clover, or rub the Buddha's belly at your favorite Chinese restaurant.

Or heed the words of the third U.S. President, Thomas Jefferson:

"I'm a great believer in luck, and I find the harder I work the more I have of it."

Unfortunately, like in everything else, the experience can only come with time. Fortunately for you, Bill Good Marketing® celebrated it's 25th year in 2006 and we have plenty of experience in Marketing Timing.

> **TIMING:**
> 1. To set the time for (an event or occasion).
> 2. To adjust to keep accurate time.
> **3. To adjust so that a force is applied or an action occurs at the desired time: *timed his swing so as to hit the ball squarely*.**
> 4. To record the speed or duration of: time a runner.
> 5. To set or maintain the tempo, speed, or duration of: time a manufacturing process.*

With experience, you will learn that November 30 is not the best time to send a product specific, 40 page, dissertation on Mutual Fund V W Z Y Z but it is an excellent time to send a heart warming Year End or Holiday message.

The luck part of timing just can't be controlled. You may be reading this while waiting in the dentist's office. You may come to associate Bill Good Marketing with having your teeth drilled. If this sounds like something you are prone to do, stop reading now and wait for better timing.

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Bringing it all together is the challenge that the Marketing Master will face. The best message can be wasted on a bad list. The best list will provide poor response when combined with an inferior message. If your timing is off because you send Christmas letters in July, if your timing is off because some amazing or horrifying event has captured the attention of the nation, the best lists and messages will suffer.

Now that you know a little more about Marketing, let's put together your Two-Year Marketing Plan.

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THE CLIENT MARKETING PLAN

We ALWAYS start with clients. There are three objectives to consider, which make up the totality of Client Marketing: retention, business now, and business in the future.

Let's take these one at a time.

RETENTION: Of course, every message fulfills that most important step in the Bill Good Marketing® Client Retention Formula, "Send every client a message at least every month about something the client is interested in."

Nevertheless, some messages are strictly designed for retention.

You know you want an "All Clients" letter for Christmas and Memorial Day, minimum. Possibly July 4 and Thanksgiving as well.

So put these in the plan.

BUSINESS NOW: A certain number of your clients should be able to provide you with business now. The key to getting their business is to *always* be prepared.

Example: You have 25 clients with Manager X. You know that some of them also have other Advisors that they work with. Objective: Get your fair share of the money (100%, right?). You do this by sending the following "Call Me" letter:

"I have some very important news about Manager X. Call me."

For this to work you have to have your clients with Manager X identified so you can generate a list of them and you have to have the important news about Manager X. You certainly can't PLAN to send this message next week because you don't know when the opportunity will arise. So you have to BE PREPARED.

That preparation will include:

1. Identifying all of your clients and all of their holdings both in and out of your book.
2. Having a software (It's the 2000s, people, you need to computerize) that will easily generate a list by Investment.
3. Having compliance approved communications that will handle common situations such as Market Soars, Market Falls, Good News About X, Bad News About X, Regular Review Announcement/Invitation. You may think of others that you could use regularly. If so, write them and get them approved A.S.A.P.

BUSINESS IN THE FUTURE: The response to your marketing should be much better than you expect if you incorporate most of what has been covered to this point. HOWEVER, often times advisors chase after the money that is available as business now and let the future business slip through the cracks. DON'T LET THIS HAPPEN TO YOU! LET NOTHING EVER SLIP THROUGH THE CRACKS AGAIN!!!!!

The same software that will generate your mailing lists should also be able to record future opportunities as you become aware of them. The "Sticky Note–Collage System" of tracking future funds due is outdated and subject to destruction by overly zealous cleaning crews and newly hired ambitious Sales Assistants.

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The Bill Good Marketing System® Solution

In addition to achieving Client Retention, Business Now and Future Business, The Bill Good Marketing System has campaigns and processes built in to accommodate and enhance 6 of the 7 basic steps in the Bill Good Marketing® Client Retention Formula.

1. **Provide Good Financial Advice.**

   This is all you. We don't tell clients how to advise, that's where you are the expert. Remember, we are the Master Marketers.

2. **Provide Great Service.**

   The System provides delegation features and training materials available for all of your service personnel. Also the Gorilla® Software emphasizes the delegates' tasks so nothing will fall through the cracks.

3. **Send Every Client a Letter Every Month.**

   This regular communication will serve client loyalty and increased advisor awareness. When the opportunities in your clients' lives arise, they will think of you first!

4. **Make Sure Every Client Is Contacted by Phone Regularly.**

   Bill Good researched this point extensively. Weekly was too much, even monthly was too frequent for some clients. BUT when used in conjunction with the "Monthly Drip Campaign," **a quarterly phone call** from someone in your office, not necessarily you, resulted in excellent client retention. We define excellent as 100%.

5. **Use Lots Of Etiquette Letters.**

   Please, Thank You, Congratulations, Condolence, I'm sorry—all examples of saying the right thing. With the 141 separate Etiquette Messages available to System users, you will always have the right thing to say for the occasion. Empower your staff to order one of these messages to be sent and you will always say the right thing, even before you know you said it.

6. **Send Every Client and Every Spouse a Birthday Letter.**

   Magic! Notice this step reads "letter" not "card." Letters are Magic. Anybody can sign a card.

7. **Invite Clients to a Client-Education Seminar.**

   Since 2001 we have included this step in the Client Retention Formula. The results: not just greater client retention but a better informed Client book who won't panic at the slight twists and turns their investments may take.

Establish these as soon as possible and you will see an increase in Client Retention, Business Now and Future Business.

Special Note: On Referrals!

As your clients come to know you as their source of financial information, they take it upon themselves to share what you've shared with them, taught them and done for them with their friends. The Bill Good Marketing Client Retention Strategy is THE BEST REFERRALS PROSPECTING STRATEGY AVAILABLE—PERIOD!

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Unless you're brand new to an area, you know lots of people that you would like to do business with and that you have probably not felt comfortable about approaching. They may be social connections who you know have some money but there is no right way to get them into your office to work on their portfolio.

You could go broke taking them to lunch and dinner trying to find the right time and way to broach the subject. You must develop a strategy to bring these people around to your office. And if your strategy doesn't end with them calling you hoping to get a spot on *your* calendar, then you have the wrong strategy.

The Bill Good Marketing System Solution

$50 MILLION WILSON CAMPAIGN. This campaign uses an indefinite series of monthly "no-key"—lower key than low-key—Letters. It is designed to build an identity for you with people you know, that you would like to do business with, but whom you do not want to prospect aggressively, if at all. So we help you focus on building the relationship and never in fact solicit anything. In time, as you continue sending these "no key" letters, faxes, and emails, people will begin coming up to you and asking questions. At this point, they have said to you, "I am a Prospect." This campaign is based upon the absolute truth that **"people like doing business with people they know."**

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THE PROSPECT MARKETING PLAN

Prospects are defined. You know that there is something of value in each prospect. You have identified them as the Prospect who is ready now, the Prospect who is ready later, the Prospect who might be good, the Prospect who will take your call but whom you know has no money—he's just lonely. This group of people is much better to deal with than a cold calling list or a mass mailing list. At least they *might* know you.

To bring these people into your book you should apply as many of the client retention strategy steps as you can. If you begin to treat them as clients they will start to ask themselves why their current advisor doesn't treat them as well. Then they begin to wonder why they are not one of your clients. When they start to call you, remember to give the credit where it is due—Bill Good.

The Bill Good Marketing System Solution

The Prospect Marketing Plan is built around the "Three Way Harvest." The whole and entire purpose of the "Three Way Harvest" is, through a series of low key, repetitive mailings and callings, convince qualified prospects it is safe to talk to you.

The First Way

Every month, your prospects get a letter, fax, or email. These mailings should mostly be coupon mailings that present an idea and ask people to respond, or should be a seminar invitation that urges them to attend an event.

Every once in a while, your monthly prospect letter should be a "Blitz" designed to flood your office with incoming calls.

The Second Way

The 90-Day No Contact Call. Your Sales Assistant should always gently probe to see if someone read your recent letter and wants to talk to you about it. Additionally, this step will provide the opportunity for the Prospect to re-categorize themselves as warmer or colder or off the list. If you can save first class postage from someone who doesn't want more mail from you, do it.

The Third Way

Never let anything slip through the cracks. Record everything you learn and use it to your advantage in every communication. If you learn that a prospect's grandson is a huge hockey fan and if you learn that Lord Stanley's Cup (The world's largest Professional Championship Trophy) is coming through town, call the prospect and tell them. Or better yet:

WHENEVER YOU OR YOUR SALES ASSISTANT TALK TO A PROSPECT WHO IS NOT GOING TO START OR PROGRESS IN A SELLING CYCLE, DO YOUR VERY BEST TO FIND A TIME IN THE FUTURE WHEN THEY WILL NEED TO MAKE AN INVESTMENT DECISION—RECORD IT— AND FOLLOW UP.

As you continue to lightly drip, your chances improve that the "opportunity" will become reality when the funds are available. The Truth: No one follows up the way a Bill Good Marketing System user does.

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THE MASS MARKETING PLAN

Avoid Mass Marketing! If you are not on the Bill Good Marketing System and you don't have enough Contacts, Connections, *Defined* Prospects, and Referrals, bite the bullet and mass market.

To achieve a solid mass marketing plan, take what was covered in the first two sections of this white paper and do your best to replicate it successfully.

Maybe try seminars or something.

Mass Marketing is no fun. Cold calling is out. The wrong approach to Direct Mail just kills trees.

The Bill Good Marketing System Solution

We have several Mass Marketing campaigns that have proven effective. For the sake of brevity, the three most commonly used by our clients are listed below.

MASS MARKETING SEMINARS: What we've developed is the marketing machine to produce the audience. We also ensure that anyone who attends or wants to attend never falls through the cracks. Built into the Bill Good Marketing System are four different styles of promotional campaigns plus two different production campaigns, depending on whether you are offering a meal. Your staff automatically receive notes and reminders (posted to their calendars) whenever a campaign assignment is due. So when you decide to give a seminar, all you have to do is fill out the Campaign Order Form for the style you want and turn it over to your staff. The staff and the computer do all the rest of the work until the day of the seminar. At that point you have to show up, give the seminar, and then rush back to the office to fill the appointments from the seminar you gave two weeks ago!

THE MOTHER OF ALL RETIREMENT PLANNING PROSPECTING CAMPAIGNS: Affectionately referred to as **"The Mother,"** this campaign is a direct mail campaign designed to identify people's retirement dates and then stay in close touch with those who will be retiring within the next year. One of the best mass-mail campaigns in the financial services industry. Jeff Johnson, who for years has been a top account opener at one of the major brokerage firms, created it. If you don't want to do seminars, and if you would like to have a few direct-mail leads coming in *every* day, the Mother Campaign may be just right for you. We recommend up to 100 letters per day.

THE ELLIOTT CAMPAIGN: This is a pure direct mail campaign. It has versions for stockbrokers, financial planners, and people who want to raise managed money. When running The Elliott Campaign, if you run it by the book you will print 500 letters a week and mail 100 letters a day. As responses come in, you will typically call and set appointments with those who are interested. Those not interested in an appointment now are moved into the "Saturation Phase" and sent requested information frequently. They are re-called every 90 days. There are countless cases on record of Advisors who have built an entire business around this campaign.

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Frankly, we have yet to discover how all of these marketing plans can be achieved without the Bill Good Marketing System. If you must try, remember the best-tested marketing order is:

1. Clients
2. Prospects
3. Mass Mail

If you have enough clients (say 250) and successfully implement the Bill Good Marketing Client Retention Strategy, you could see enough increase in income, over two years, to license your own copy of the Bill Good Marketing System. But if you can do it, why would you wait?

The Bill Good Marketing System Solution

The First Step is to call 800-678-1480. Ask some questions . . . get some answers.

When you come to Utah, to attend System training, the two-year clock starts ticking.

FIRST WEEK: Train in Utah and print letters for your first campaign.

FIRST MONTH: Send Letters from Find the Money Campaign, Process Responses from FtM campaign, Follow up with Referrals from FtM Campaign, Meet with New appointments from FtM Campaign. Establish No Contact Calls for both Clients and Prospects. Establish Birthday and Etiquette procedures.

SECOND MONTH: Establish targeted Monthly Drip Campaign for Client Marketing. Resend FtM to non-respondents. Follow-up with any Green Cherries® from previous month. Follow up with Referrals from FtM Campaign. Meet with New Appointments from FtM Campaign. Continue Birthday and Etiquette procedures.

THIRD MONTH: Establish Prospecting Campaign (maybe Old Prospect Campaign or Seminars), continue targeted Monthly Drip Campaign for Client Marketing, resend FtM non-respondents (Last Time), follow-up with any Green Cherries from previous months, follow up with referrals from FtM Campaign or Clients. At end of month close the FtM Campaign.

NEXT 15 MONTHS: Continue or establish new Prospecting Campaigns, continue targeted Monthly Drip Campaign for Client Marketing, follow-up with any Green Cherries from previous months, follow up with referrals from Clients, continue Birthday and Etiquette procedures. Continue Birthday and Etiquette procedures.

CONTINUALLY THROUGHOUT THE TWO-YEAR PLAN: Inspect what you expect. Always test new ideas, keep meticulous records. Continue successful actions, discontinue unsuccessful actions.

The two-year objective of the Bill Good Marketing System:

Double Production or work half as much.

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NOW DO IT!

DON'T REINVENT THE WHEEL: There are plenty of folks in this industry who don't market themselves with this System. Some have good results and some don't make it. In our experience, people who keep the Bill Good Marketing System in their practice experience much better results than those who don't.

The bottom line is you must have some form of marketing in place for your book, and for your business to grow. It is very rare that the biggest and best clients come waltzing into your office unannounced and on their own. The qualified clients you want in your book just don't "let their fingers do the walking."

Start seeing results for your efforts. Call us today.

For more information, contact us:

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