



THE ADVISOR

SUITE

A GLIMPSE INTO
PRINCIPLE-BASED MARKETING



**“YOU CAN NEVER RISE HIGHER
THAN YOUR FOUNDATION ALLOWS”**

HAVE YOU EVER NOTICED HOW COMPLICATED A CAR ENGINE IS? IF ALL THE PARTS DO NOT WORK TOGETHER CORRECTLY, IT WON'T RUN VERY WELL, IF AT ALL.

MARKETING TODAY HAS A SIMILAR DEGREE OF COMPLEXITY. YOUR WEBSITE, EMAILS, PAID ADS, SEO, SOCIAL MEDIA, BLOG, WEBINARS, AND SO ON ALL NEED TO BE WORKING TOGETHER CORRECTLY OR YOUR MARKETING ENGINE WON'T RUN VERY WELL.

WE HAVE NOTICED THAT THE MORE VENDORS AN ADVISOR WORKS WITH, THE LESS EFFICIENT THE MARKETING ENGINE IS. CONSIDER THE POWER OFFERED BY THE ADVISORS SUITE. **ONE AGENCY. MULTIPLE LEAD SOURCES.**



“AUTHENTICITY OVER AMBIGUITY”

THE BEST MARKETING SITUATION FOR A FINANCIAL ADVISOR, MORE OFTEN THAN NOT, IS AN INTERNAL MARKETING TEAM.

WHEN YOU RELY ON YOUR CUSTODIAN OR FMO/IMO FOR WHITE-LABELED MATERIALS, YOU GIVE UP A PART OF YOUR AUTHENTICITY AND IDENTITY.

IF YOU DON'T WANT TO PAY FOR A COMPLETE INTERNAL MARKETING TEAM, OR IF YOU DON'T WANT TO BUILD IT OUT, OR IF YOU DON'T KNOW HOW TO BUILD IT OUT, **THEN CONSIDER INTEGRATING WITH THE ADVISOR SUITE.**



“ALWAYS BE GUIDED BY PRINCIPLES”

CONSIDER THE FOLLOWING PRINCIPLES
IN YOUR NEXT MARKETING CAMPAIGN:

THE PRINCIPLE OF CHANGE SUGGESTS
THAT UNLESS THE PAIN OF CHANGE
BECOMES LESS THAN THE PAIN OF
CONTINUING ON, INDIVIDUALS WILL
NOT CHANGE.

THE PRINCIPLE OF PERMISSION SUGGESTS
THAT UNLESS YOU ARE GIVEN
PERMISSION TO SPEAK, IT DOES NOT
MATTER HOW LOUD YOU ARE, THEY ARE
NOT LISTENING.

THE PRINCIPLE OF DIRECTION SUGGESTS
THAT UNLESS YOU CLEARLY EXPLAIN
WHAT YOU OFFER, WHAT IS EXPECTED,
AND WHAT THE NEXT STEPS ARE, THERE IS
A HIGH PROBABILITY THEY WILL NO ACT.



“INSTEAD OF ATTENTION SEEKING,
TRY VALUE OFFERING”

HOW TO BUILD A MARKETING ENGINE IN THREE STEPS:

DEVELOP: CREATE A CLEAR BRAND, DETERMINE THE GUIDING PRINCIPLES, NAME YOUR PROCESS, AND DECIDE WHICH MARKETING METHODS TO USE.

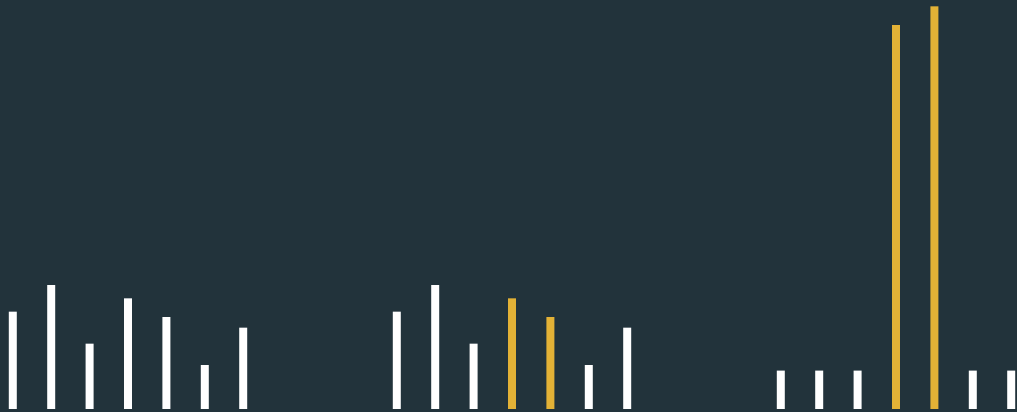
BUILD: BUILD OR ADJUST THE MARKETING FOUNDATION (WEBSITE AND EMAIL MARKETING). THEN CREATE THE OTHER CAMPAIGNS AROUND IT.

CONTINUOUS IMPROVEMENT: BUILDING A MARKETING CAMPAIGN IS 20% OF THE WORK. 80% FALLS UNDER THE MINDSET OF CONTINUOUS OPTIMIZATION WITH SUBTLE ADJUSTMENTS .



**“THE LAW OF CONGRUENCE ENCOURAGES
NARROW FOCUS, NOT WIDE NETS”**

CONSIDER THE FOLLOWING IN YOUR
DEVELOPMENT PHASE:



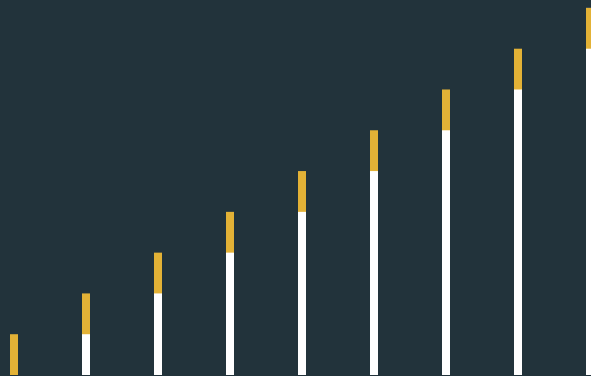
“REDUCE OPTIONS. INCREASE FOCUS.
MULTIPLY RESULTS”

-BEHAVIOR GAP
- VISUALIZE VALUE (GRAPHIC CONCEPT)



**“DELIBERATE DEVELOPMENT LEADS TO
DELIBERATE RESULTS”**

CONSIDER THE FOLLOWING IN YOUR
BUILDING PHASE:



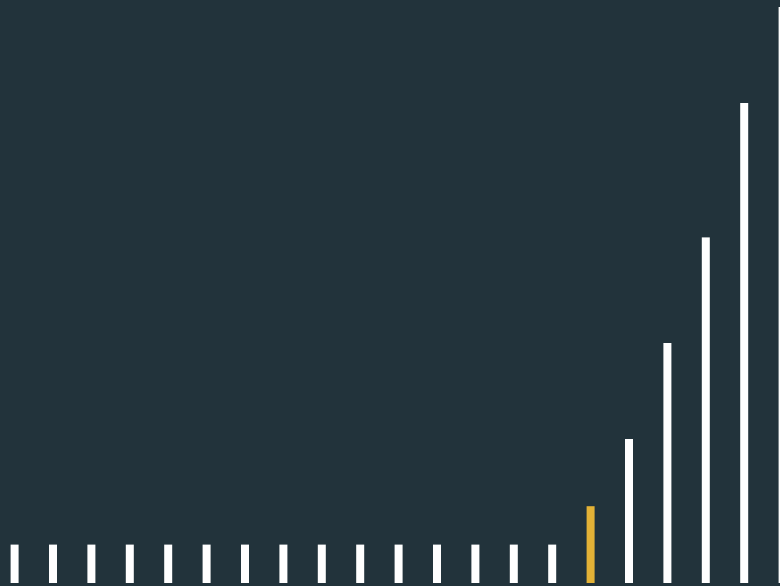
“I WAS THE SUM TOTAL OF THE OBSTACLES
I’D OVERCOME”

-DAVID GOGGINS
- VISUALIZE VALUE (GRAPHIC CONCEPT)



**“THERE ARE NO SILVER BULLETS IN MARKETING,
ONLY PRINCIPLES AND PERSEVERANCE”**

CONSIDER THE FOLLOWING IN YOUR
CONTINUOUS IMPROVEMENT PHASE:



“THE TIPPING POINT IS NOT A QUESTION
OF IF, BUT WHEN”

-JOHN FONTANELLA
- VISUALIZE VALUE (GRAPHIC CONCEPT)



“PLANT SEEDS, NOT SHINNY OBJECTS”

**THE FOLLOWING SERVICES ARE OFFERED
BY THE ADVISOR SUITE**

**BRANDING DEVELOPMENT
SALES PROCESS DEVELOPMENT
MARKETING STRATEGY DEVELOPMENT
WEBSITE MANAGEMENT
EMAIL MARKETING
BROADCASTING (RADIO/PODCAST)
LEAD MAGNET CREATION
SEO
PAID DIGITAL ADS
CONTENT CREATION
GRAPHIC DESIGN
VIDEO PRODUCTION
LIVE EVENT DEVELOPMENT
SOCIAL MEDIA MARKETING
PUBLIC RELATIONS
MEDIA BUYING
LMS CREATION
CUSTOM REPORTING**



“THE ONLY WAY TO HEAL IS
TO DEAL WITH THE PAIN”

THE FOLLOWING IS THE PRICING SCHEDULE FOR THE ADVISOR SUITE

DEVELOPMENT AND BUILD :

SPEND ONE MONTH WITH THE ADVISOR SUITE AND DEVELOP A CLEAR BRAND, GUIDING PRINCIPLES, AND CLARITY ON HOW TO PROCEED. DELEGATE THE ADVISOR SUITE TO BUILD YOUR MARKETING ENGINE, THE FOUNDATION OF YOUR MARKETING EFFORTS.

\$10,000 (SETUP COST)

CONTINUOUS IMPROVEMENT:

INTEGRATE WITH THE ADVISOR SUITE AND ALLOW THEM TO RUN ALL OF YOUR MARKETING CAMPAIGNS WITH THE CONTINUOUS IMPROVEMENT MINDSET.

\$5,000 (STARTING IN MONTH 2)



“OUR SCIENCE, PLUS OUR STRUCTURE,
PLUS **YOUR AUTHENTICITY**”

IF YOU WANT TO INTEGRATE WITH THE ADVISOR SUITE, THEN GO TO [THEADVISORSUITE.COM](https://theadvisorsuite.com) AND CLICK ON THE BUTTON THAT SAYS “**SCHEDULE A CALL**”.

YOU WILL BE ABLE TO **SCHEDULE A TIME ON OUR CALENDAR**. AFTER YOU SCHEDULE, YOU WILL BE ASKED TO FILL OUT THE **SUITE MARKETING ASSESSMENT**, WHICH TAKES AROUND 3 MIN. THIS WILL ALLOW THE ADVISOR SUITE TO PREPARE FOR THE CALL.

THE PURPOSE OF THE CALL IS TO **REVIEW THE PRINCIPLES OF MARKETING**, UNDERSTAND **WHAT YOU WANT** FROM A FULL-SERVICE MARKETING AGENCY, AND **DETERMINE IF IT MAKES SENSE TO INTEGRATE, OR NOT**.



THE ADVISOR
— SUITE —

ONE AGENCY. MULTIPLE LEAD SOURCES.
(801) 896-1234 | [THEADVISORSUITE.COM](http://theadvisorsuite.com)



**“STOP ASKING PEOPLE TO MARRY YOU
ON THE FIRST DATE”**

HOW TO APPLY THE MARKETING PRINCIPLES TO A CAMPAIGN:

THE PRINCIPLE OF PERMISSION

STEP 1: RAISE AWARENESS OF VALUE OFFERED

STEP 2: EXCHANGE VALUE FOR AN EMAIL, COOKIE, OR OTHER SOURCE OF DATA

STEP 3: COLLECT DATA AND DETERMINE WHAT IS WANTED

THE PRINCIPLE OF DIRECTION

STEP 4: OFFER A PRODUCT OR SERVICE BASED ON WHAT IS WANTED

STEP 5: SET EXPECTATIONS

STEP 6: DESCRIBE NEXT STEPS AND INVITE THEM TO TAKE ACTION