

LTM Client Marketing

12 MONTH MARKETING PROGRAM

ARE YOU ENGAGING WITH YOUR CLIENTS CONSISTENTLY?

We know your time is valuable, and the focus tends to be on prospecting and cultivating new relationships and business for your firm. So, let us help you with your client retention efforts, which can lead to future cross-selling opportunities!

If you aren't staying in touch, how will you know when your clients are going through a major life event and be in need of your services?



WHAT IS THE 12 MONTH MARKETING PROGRAM?



This is a highly personalized automated multi-channel marketing program designed to help financial professionals build client relationships, and to grow their business. Each of your clients will receive at least one monthly personalized communication from you to ensure you stay connected and brand yourself as the go-to financial professional.

WHY 18 ANNUAL TOUCH POINTS?

Consistent, frequent communication is the key to building long-lasting mutually beneficial relationships. In fact, according to the Business Health's Future Ready VIII report, practices that contact their clients more than **ten times a year are 287% more profitable** than those that have less frequent contact.

This program takes it a step further by including 12 direct mail and 6 digital touch points for a total of 18 annual touch points. According to the Direct Marketing Association (DMA), direct mail response rates have **risen from 3.7% in 2015 to 9%** in 2020. This is due to better marketing automation, and less clutter in the physical mailbox.

18 ANNUAL TOUCHPOINTS

CUSTOMIZE YOUR MARKETING PROGRAM						
	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
TOPIC	Schedule Your Review	Let's Talk Money® or Loose Change® Newsletter	You Choose: College Planning, Retirement Planning, or Insurance	Let's Talk Money® or Loose Change® Newsletter	Referral Outreach	Let's Talk Money® or Loose Change® Newsletter
TOUCHPOINTS	5" x 7" Postcard plus eNewsletter 	8.5" x 11" Newsletter 	8.5" x 11" Bifold Mailer plus eNewsletter 	8.5" x 11" Newsletter 	6x9 Invite Self-Mailer plus eNewsletter 	8.5" x 11" Newsletter 
TOPIC	You Choose: College Planning, Retirement Planning, or Insurance	Let's Talk Money® or Loose Change® Newsletter	You Choose: Year-end Planning or Cybersecurity	Let's Talk Money® or Loose Change® Newsletter	You Choose: Corporate or Thankful Referral Outreach	Holiday Card Multiple versions available
TOUCHPOINTS	6" x 9" Postcard plus eNewsletter 	8.5" x 11" Newsletter 	8.5" x 14" Letter Mailer plus eNewsletter 	8.5" x 11" Newsletter 	Referral Card Mailer plus eNewsletter 	5" x 7" Holiday Card with A7 Envelope 

HOW IS THE PROGRAM USED?

The program helps financial professionals with their client retention and relationship building strategies. Each touch point is personalized with their photo, logo, and contact information to help promote their brand.

The content was crafted to provoke thought by your clients regarding their finances throughout the year, and to contact you with any questions. Also, sometimes it can be difficult to ask your clients for referrals, so this program takes care of that for you at least twice per year.

Best Practices and Tips



You or your marketing assistant should call at least 10 clients each month as a follow up to the direct mail piece. The content you will be providing serves as a great ice breaker and reason to check in with your clients.

Regularly review the eNewsletter/website statistics through the Online Customer Service (OCS) site for client engagement, and any new opt-ins through the “Subscribe” website feature. The new opt-ins are most likely a result of your clients sharing the content with friends and family; a great referral lead source.



Be consistent. Stay on track with the program and follow the monthly schedule.

BY THE NUMBERS - Why Client Retention Matters



The probability of selling to an existing customer is 60-70 percent. The probability of selling to a new prospect is 5-20 percent.



80 percent of your future profits will come from just 20 percent of your existing customers.



It costs 5 percent more to acquire a new customer than it does to keep a current one.



68 percent of customers leave you because they perceive you are indifferent to them.

(Small Business Trends)

ONLY \$1.55
PER CLIENT, MONTHLY



DIRECT MAIL + DIGITAL

Increase client interaction with multi-channel marketing.



TARGETED COMMUNICATIONS

Engage clients with FINRA reviewed content customized to them.



FULLY AUTOMATED, TURNKEY SOLUTION

Plan annually, pay monthly as you go.

FREQUENTLY ASKED QUESTIONS

Q: On months that have a direct mail piece and eNewsletter, will I be billed twice that month?

A: No, even though there are multiple touch points within that month you will only be billed for the direct mail touch point that month. In fact, we used this blended rate pricing model to help distribute the costs evenly for you throughout the year.

Plan Annually. Pay Monthly.

Q: How do I manage my mailing list each month?

A: We've created a master list under the 12 Month Marketing program within our Online Customer Service (OCS) platform. Your master mailing list contains all the address information and can be edited at anytime.

VIDEO: 
*Managing Your
Mailing List on OCS*

Q: There are certain touch points with multiple topic choices, how and when do I choose?

A: When you enroll, you can let your Marketing Specialist know and we'll set it up automatically for you. Or if you're not quite sure, contact our team at least 2 weeks prior to the distribution month and we'll make the change.

Q: How do I get this approved by my compliance team?

A: Great news! We've worked with your compliance and marketing team to have this program pre-approved, and the content is all FINRA reviewed. This makes it even easier to enroll and get started.

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