

# The Exclusive Coaching Program

Proven Systems ... Customized Advice ... Results

## YOUR MEANINGFUL ACTIVITY CALENDAR

Foundational Activities to Build Your  
Multi-Touch Marketing Calendar



# 2022 Meaningful Activity Calendar

The Foundation for Achieving Your Retention and Growth Goals



Your 2022 marketing calendar will be the foundation for the entire year's marketing activity. It should directly reflect the revenue, retention, and new client acquisition goals you have set for this year. Therefore, you must consider the following commitments:

- **Activity Commitment:** You have determined the goals you want to achieve in 2022? Are you ready to personally commit to the effort required to achieve these goals?
- **Time Commitment:** Have you done a realistic assessment of the time commitment necessary to achieve the activity on your calendar?
- **Financial Commitment:** Have you set a realistic marketing budget?
- **Team Commitment:** Have you evaluated your team's time and resource capabilities to achieve these activities and which team member will be assigned to each activity?

Remember, your marketing is focused on not only building a pipeline of qualified prospects, but the maintenance of existing clients. All of our activities are designed to satisfy both goals.

## KEYS TO SUCCESS

**Be realistic with your expectations.**

Make sure they are within your commitment capacity, time limitations, team capabilities and allotted budget.

Remember, you do not have to implement every marketing strategy the Academy offers.

***Small changes can lead to very strong results if properly executed.***

# Foundational Activities

## Minimum Calendar of Meaningful Activity



### WHAT ARE FOUNDATIONAL ACTIVITIES?

**Definition:** The **minimum activities** necessary for the foundation of your marketing calendar. These activities will link you directly to your clients and targeted individuals on your Prospect Awareness List (your PALs).

- 1** Welcome to 2022 Letter
- 4** Quarterly Economic Reports
- 6** Virtual or Live Workshops
- 2** Tax Reports
- 6** Articles
- 1** Client Appreciation Event
- 1** Bite back at IRS Card
- 2** Client Meetings (Q1 and Q3 or Q2 and Q4)

**OVER 20 Foundational Activities**

Remember, your marketing goal is to:

**Maintain All Qualified Clients  
and Attract Qualified Prospects.**

Your foundational activities are the minimum activities that will strengthen the connection you have with existing clients and connect you to new prospects.

The 20+ foundational activities recommended by the Academy are time-tested and proven to create the strongest foundation for your 12-month marketing calendar. From these building blocks, you can then add onto your calendar to strengthen and solidify your marketing activity.

These activities are equally dispersed in a timely fashion so that each month and quarter you consistently connect with both your clients and prospects. Please see our SAMPLE Minimum Calendar of Meaningful Activity for the month/quarter these foundational activities should take place.



#### **Five Star Tip**

While your best clients are typically met with two times per year (Q1 and Q3 or Q2 and Q4), best practices reserve time in the second month of each quarter to hold a review with those clients that are scheduled for that quarter.



# Foundational Activities

## SAMPLE Calendar of Meaningful Activity



Q1	<b>JANUARY</b> <ul style="list-style-type: none"> <li>Welcome to 2022</li> <li>Quarterly Economic Report</li> <li>Online Workshop</li> </ul>	<b>FEBRUARY</b> <ul style="list-style-type: none"> <li>Tax Report</li> <li>Bite Back at IRS</li> <li>Client Reviews (for those who get Q1 reviews)</li> </ul>	<b>MARCH</b> <ul style="list-style-type: none"> <li>Online Tax Workshop</li> <li>Article</li> <li>Client Educational Event (Live)</li> </ul>
	<b>APRIL</b> <ul style="list-style-type: none"> <li>Quarterly Economic Report</li> <li>Online Workshop</li> </ul>	<b>MAY</b> <ul style="list-style-type: none"> <li>Article</li> <li>Client Reviews (for those who get Q2 reviews)</li> </ul>	<b>JUNE</b> <ul style="list-style-type: none"> <li>Article</li> <li>Client Educational Event (Live)</li> </ul>
	<b>JULY</b> <ul style="list-style-type: none"> <li>Quarterly Economic Report</li> <li>Online Workshop</li> </ul>	<b>AUGUST</b> <ul style="list-style-type: none"> <li>Article</li> <li>Client Appreciation Event</li> <li>Client Reviews (for those who get Q3 reviews)</li> </ul>	<b>SEPTEMBER</b> <ul style="list-style-type: none"> <li>Article</li> </ul>
Q4	<b>OCTOBER</b> <ul style="list-style-type: none"> <li>Quarterly Economic Report</li> <li>Online Workshop</li> </ul>	<b>NOVEMBER</b> <ul style="list-style-type: none"> <li>Year-end Tax Report</li> <li>Client Reviews (for those who get Q4 reviews)</li> <li>Online Tax Workshop</li> <li>Client Educational Event (Live)</li> </ul>	<b>DECEMBER</b> <ul style="list-style-type: none"> <li>Article</li> <li>Client Appreciation Event</li> </ul>

Qtrly. Economic Reports	Tax Reports	Articles	Workshops or Event	Other
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# A Quick Guide for Creating and Maximizing Your 12-Month Calendar of Meaningful Activity

In order to achieve your revenue goal in a very efficient manner, you must think about and commit to scheduling a calendar for your marketing. This marketing plan, which you will then implement, should be one that considers **your personal commitment to increase revenue**. It should be centered around your time and activity commitment so that you are continuously trying to maintain existing clients while building a pipeline of qualified prospects.

1. First, plan your foundational activities then add your other marketing activities.
2. When committing to marketing, remember to address all three groups that you interface with:
  - a. Clients
  - b. Referrals
  - c. Centers of Influence
3. When assigning each activity to a team member, make sure to list the time commitment required.

**Example:** Client Newsletter Printing & Mailing – 4 hours

Client and Referral Educational Workshop – 14 hours (If in-person, including all planning time!)

4. On each activity, please allocate a reasonable investment commitment.

**Example:** Client Letter Mailing (250 pieces x \$1.50) = \$375

Client and Referral Educational Workshop = \$3,500 (If in-person)

5. Total up your investment and time commitment amounts for the year to determine if your plan is feasible. Then, and only then, should you add, eliminate, or modify your proposed activities.
6. **Remember – marketing is like oxygen; you need it to live healthy!**

★★★★★

**Five Star Tip**

We have seen great results when a well-organized schedule makes strategic timing changes and/or adds a few new marketing activities.

## Here is an example of what a typical month should look like:

Month	Marketing Activity	Person Responsible	Time	Investment
January	Welcome Letter/Article	Dana	4	1,500
	Quarterly Economic Report	Dana	4	1,800
	Client Birthday/Anniversary Cards	Dana		

**REMEMBER:** You must always have all marketing materials you use with your clients and prospects approved by your firm's compliance department!

# My 2022 Calendar of Meaningful Activity

<b>Month</b>	<b>Marketing Activity</b>	<b>Team Member</b>	<b>Time</b>	<b>\$ Investment</b>
<b>January</b>				
<b>February</b>				
<b>March</b>				
<b>April</b>				
<b>May</b>				
<b>June</b>				

<b>Month</b>	<b>Marketing Activity</b>	<b>Team Member</b>	<b>Time</b>	<b>\$ Investment</b>
<b>July</b>				
<b>August</b>				
<b>September</b>				
<b>October</b>				
<b>November</b>				
<b>December</b>				