

## Marketing Grid

	Clients & Personal Sphere	Referral Partners	Consumer Direct
Lead Generation	<p>Ask for referrals (prospects/partners)                      Past Client Check-ups                      Free Reports                      Sales Letters, Postcards, etc.                      Email/Website marketing strategies                      Voice Broadcasting/Call Capture                      Seminars (live or online) or Conf. Calls</p>	<p>Ask for referrals (prospects/partners)                      Advisor Addendum                      Seminars (live or online) or Conf. Calls                      Associations/Organizations                      Joint Marketing/Reciprocal Introductions                      Program/Product Flyers/Free Reports                      Email/Website marketing strategies                      Sales Letters, Postcards, Free Reports</p>	<p>Direct Mail/Email/Website                      Call Capture/Internet Leads                      T.V./Radio Advertising                      Seminars (live or online) or Conf. Calls                      Associations/Organizations                      Networking/Leads Groups                      Corporate Benefits Marketing Program</p>
In Process	<p>Follow Up Letters/Emails                      Planning Portfolio                      Client Gifts                      Frequent Status Updates                      Perfect Customer Service/Surveys                      Thank You Notes/Letters                      Post Purchase Call</p>	<p>Frequent Status Updates                      Perfect Customer Service/Surveys                      Thank You Notes/Letters                      Post Purchase Call                      Add Value to your partners  <i>- Be a revenue enhancer, recruiter, mentor, advocate, publicist, loan broker and purchasing agent to them to build loyalty</i></p>	
Client Retention	<p>Educational Newsletters                      Personal Letters/Postcards                      Client Success Stories                      Client Appreciation Events                      Continuity Programs/CRM                      Program/Product Flyers                      Email Updates and Audio/Video Clips</p>	<p>Educational Newsletter                      Personal letters/Postcards                      Client Success Stories                      Client Appreciation Events                      Continuity Programs/CRM                      Program/Product Flyers                      Email Updates and Audio/Video Clips</p>	