

MRW will tailor a marketing plan specifically designed around your goals. You will have a dedicated support person to help you implement this plan throughout the year.



Prioritize Your Goals

Select the top three initiatives you would like to implement throughout the year. MRW Financial provides a variety of marketing opportunities for you to take advantage of as a Premier Partner. We will discuss which ones are right for you at our initial meeting and create a plan for implementation to ensure results.

Create a Marketing Calendar

Use this tool to create a marketing calendar that will allow you to plan and monitor your marketing activities throughout the year.

With a marketing calendar, you are able to organize all of your activities to effectively promote your business to your target clients and stay on track of your goals.



Marketing Calendar

January 2018

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 Prospecting Emails	3	4 Phone calls Thank you notes	5	6	7
8	9	10 TOP Mailer	11	12	13	14
15	16	17 Follow up on TOP mailer	18	19	20	21
22	23 Newsletter	24	25	26 Follow up on newsletter hits	27	28
29	30 Prospecting Emails	31 MoneyGuard postcards				

Activity	Date	Description	Audience	Results
Prospecting	1/2/12	Make a list of prospects	Clients with policies <5 years old	
Ecards	1/2/12	Happy New Year ecards	Current and potential clients	10 responses
Thank You Notes	1/4/12	Thank you for business notes	Current clients	2 referrals
TOP Mailer	1/10/12	Trans TOP mailer	Clients with policies <5 years old	5 apps.
Ongoing Initiatives	Date	Description	Audience	Results
Thank You Notes	First of the month	Thank you for business notes	Current clients	Referrals
Newsletter	Middle of the month	Monthly E-newsletter	Email list	Responses
Prospecting	Weekly	Client list for target marketing	Current and potential clients	Responses/Referrals
Upcoming Events	Date	Description	Audience	Results
Client Policy Review	1/24/12	Review current coverage	Mr. and Mrs. Smith	New app for more coverage

Benefits of a Marketing Plan

- ❖ Prepares your business to capitalize on opportunities
- ❖ Helps you plan and finance your goals
- ❖ Sets your objectives for marketing your business

It can significantly help focus your business on achieving the goals you believe are most important to marketing and business success.

For outstanding service and exceptional solutions call:

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