

# Marketing Minute

Communication Skills for Business-Savvy Professionals



## Today's Big Idea: Listen to the Masters, Follow their Advice

Marie Swift, Marketing Communications Coach

In September, I had the privilege of flying to San Diego to attend the annual Planners' Resource Day. Co-sponsored by the San Diego FPA and NAPFA chapters, the day-long meeting was a real treat. **Bob Veres**, publisher of **Inside Information** ([www.BobVeres.com](http://www.BobVeres.com)) kicked off a multi-presenter session called **Practice Nirvana**. After participants scored themselves using a proprietary rating system created by the Practice Nirvana team, Veres helped them understand what their two scores meant. I was pleasantly surprised by mine!

Then **Tracy Beckes**, legendary coach and advocate for an "effortless business/outrageous life," took the stage ([www.TracyBeckes.com](http://www.TracyBeckes.com)). Wow! What a wonderfully motivating message and lots of good ideas for improving one's outlook on business ... and life. Beckes was followed by **Joel Bruckenstein**, publisher with David Drucker of **Virtual Office News** ([www.JoelBruckenstein.com](http://www.JoelBruckenstein.com)), who is perhaps the best known tech guru in our industry. Joel helped attendees understand the trends that are most likely to impact them in the years ahead. He also provided a variety of tips on improving productivity, including recommendations for purchasing what he considers the best hardware and software solutions for the independent advisor's business.

**David Drucker** was the fourth **Practice Nirvana** speaker. A walking fount of knowledge, Dave shared ways that advisors could punch up their top lines, power drive their bottom lines and get their heads on straight. Bob Veres then returned to the stage, helping the audience synthesize what they'd learned that day. Watch for the Practice Nirvana team. I hear that several **NAPFA and FPA** chapters may be bringing them to town. If you see the Veres/Beckes/Bruckenstein/Drucker workshop on the agenda, I wouldn't miss it if I were you!

In October, I presented a **Marketing Mastery** teleconference for Garrett Members called **No-Cost or Low-Cost Ideas Any Advisor Can Use to Stimulate Referrals, Boost Business and Improve Your Bottom Line**. Judging by the number of positive comments that Sheryl and I received, the ideas I shared must have hit the spot. If you missed that call, you can still download the audio and watch the **corresponding slide show**. Both are available on the Intranet under Documents.

# Missed these sessions?

Find the Audios and More on the Garrett Intranet

**Master the Media to Attract Your Ideal Clients** was November's Marketing Mastery Topic. My special guest was **Derrick Kinney**, author of the #1 Amazon best-selling book of the same title. Derrick and I discussed the key steps necessary to work with the media, how advisors can create powerful exposure for themselves and become a household name in their communities.

Derrick's book and corresponding DVD **Marketing Secrets Revealed** detail how this successful Texas-based advisor captured the attention of local media contacts and positioned himself as the clear choice for prospective clients. He has appeared so often in high visibility articles and on televised financial news shows that people recognize him on the street and strike up a conversation. Thanks to his media efforts, his practice soared and is thriving today.

You can still download the audio from the Intranet and hear the session. Or visit [www.MoreAffluentClients.com](http://www.MoreAffluentClients.com) to learn about Derrick's **do-it-yourself marketing CD** (chock full of templates, checklists and practical advice) and book. The **Mega-Marketing Combo**, which was offered to Garrett Members at a special price, is sold out.

**David Drucker** was my special guest for December's **Marketing Mastery** call. What an incredibly gifted and hard working man. If you missed the live call, I encourage you to listen to the audio (available under the Documents section of the intranet). Dave told us all about his many writing assignments, books and ventures, including the new **Practice Management Portal** he and advisor/partner **Kris Behn** have just launched ([www.PracticeLifeCycle.com](http://www.PracticeLifeCycle.com)). He also shared **Six Sure Ways to Alienate a Journalist** — now none of US will ever make THOSE mistakes!

If you have not yet read **The One Thing You Need to Do**, the book Dave co-wrote with **D Shannon**, I strongly suggest it. What a delightful and insightful book! We have set up a special link so that you can now **order the book online AND receive a 15% discount**. This link (which can be found under the Discounts page on the Garrett Intranet) is only for members of the Garrett Planning Network. Do yourself a favor and read **The One Thing** soon! To learn all about Dave's other ventures and books, including his speaking engagements and topics, visit [www.DavidDrucker.com](http://www.DavidDrucker.com).

Are you ready for January's special guest? Join me on January 11<sup>th</sup> when **Kip Gregory**, author of **Winning Clients in a Wired World**, shares **Best Tips for Getting Organized, Gathering Market Intelligence and Creating a Winning Game Plan**. Don't miss what is sure to be a lively and informative call! Visit [www.WinningClients.com](http://www.WinningClients.com) and/or [www.KipGregory.com](http://www.KipGregory.com) and sign up for Kips Tips!