

## Action plan

Prospect and grow using digital strategies

### Prospect and grow 21-day action plan



To keep momentum as you digitally prospect and grow, this plan focuses on three key areas: developing and using your brand story, engaging brand ambassadors with digital content, and planning virtual events that keep client conversations going.

This three-week plan requires a commitment of approximately two hours per week – with the understanding that making this investment can yield noticeable progress for you and your practice.

### How to use this plan

- Before starting, read through the full plan – several activities build over a series of days, requiring you to know what’s coming next and plan ahead.
- Set incremental goals and work with an accountability partner who can help you maintain progress along the way.
- Before starting any social media activities, check with compliance regarding your company’s guidelines.

## Prospect and grow 21-day action plan, continued

Week 1

**Position** yourself across your digital platforms using your brand story.

M	T	W	T	F
<p><b>Start creating your brand story.</b></p> <ul style="list-style-type: none"> <li>List three to five challenges you've helped clients overcome.</li> <li>Select one or two that best exemplify your strengths.</li> <li>Build your story around those, keeping in mind that your story has a hero (the client) and a villain (the challenge).</li> </ul>	<p><b>Get feedback on your brand story.</b></p> <ul style="list-style-type: none"> <li>Ask a colleague, a team member or your Capital Group accountability partner for input.</li> <li>Offer to review team members' stories and compare approaches.</li> </ul>	<p><b>Evaluate your bio and profile using your brand story.</b></p> <ul style="list-style-type: none"> <li>Choose specific elements to incorporate into your website bio and LinkedIn profile.</li> <li>Begin making revisions to both.</li> </ul>	<p><b>Finalize your brand story.</b></p> <ul style="list-style-type: none"> <li>Use the feedback you received to make any final adjustments to your story.</li> <li>Save your story in a place where you can refer to it for inspiration – and to periodically update it.</li> </ul>	<p><b>Practice telling your brand story.</b></p> <ul style="list-style-type: none"> <li>Get comfortable using your brand story in conversation. Say it until it flows naturally.</li> <li>Consider which parts to emphasize when talking to a client, prospect or center of influence (COI).</li> </ul>
30 minutes	15 minutes	15 minutes	30 minutes	15 minutes
	<p><b>Bonus:</b> If you covered up the name, would people who know you recognize this as your story?</p>	<p><b>Plan ahead:</b> Set a timeline to submit your edited bio and profile to compliance by Week 3 of this action plan.</p>		
<p><b>Notes</b></p> <hr/> <hr/> <hr/> <hr/>				

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## Prospect and grow 21-day action plan, continued

Week 2

Connect digitally by using content to engage with brand ambassadors.

M	T	W	T	F
<p><b>Identify your brand ambassadors.</b></p> <ul style="list-style-type: none"> <li>• Create a list of clients who are in a position to help you grow.</li> <li>• Evaluate clients based on their referral potential and the strength of their networks.</li> <li>• When contacting potential brand ambassadors, focus on why they need you.</li> </ul>	<p><b>Engage on LinkedIn.</b></p> <ul style="list-style-type: none"> <li>• Invite brand ambassadors to connect.</li> <li>• Stay alert for changes in client profiles.</li> <li>• Include a friendly note in your LinkedIn invitations.</li> <li>• Post new content at least three times per week.</li> </ul>	<p><b>Gather content based on brand ambassadors' interests.</b></p> <ul style="list-style-type: none"> <li>• Consider news aggregators to search out content relevant to brand ambassadors.</li> <li>• Inquire about your firm's research to share with clients.</li> </ul>	<p><b>Create a weekly engagement calendar.</b></p> <ul style="list-style-type: none"> <li>• Spend time every Friday selecting articles to share with ambassadors the following week.</li> <li>• Establish a weekly plan for connecting with brand ambassadors both by phone and email.</li> <li>• Aim to contact each brand ambassador at least once every three weeks, alternating between email and phone.</li> </ul>	<p><b>Evaluate your total digital presence.</b></p> <ul style="list-style-type: none"> <li>• Review your digital storefront to evaluate its effectiveness in conveying your brand attributes.</li> <li>• Evaluate team members' bios and profiles to make sure they are aligned and consistent with each other.</li> </ul>
30 minutes	15 minutes	15 minutes	30 minutes	15 minutes
	<p><b>Plan ahead:</b> Continue revising your own LinkedIn profile. Prepare to submit it to compliance next week.</p>			<p><b>Reminder:</b> Prepare to send your revised profile and bio to compliance next week.</p>
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## Prospect and grow 21-day action plan, continued

Week 3

Engage digitally with clients through a series of virtual events.

M	T	W	T	F
<p><b>Design your workspace.</b></p> <ul style="list-style-type: none"> <li>Set up your environment and background to project your personality and professionalism.</li> </ul>	<p><b>Get feedback on your workspace.</b></p> <ul style="list-style-type: none"> <li>Ask a colleague or a team member to join you on video and provide feedback on your virtual workspace.</li> </ul>	<p><b>Create a series of virtual events.</b></p> <ul style="list-style-type: none"> <li>Make a list of topics you plan to cover.</li> <li>Create a schedule with one or two 45-minute events per month.</li> <li>Consider COIs who would be good guest speakers.</li> </ul>	<p><b>Gather event materials.</b></p> <ul style="list-style-type: none"> <li>Plan to send three emails per event: invitation, reminder and follow-up.</li> <li>Factor a compliance review of those materials into your event-planning schedule.</li> </ul>	<p><b>Plan for effective follow-up.</b></p> <ul style="list-style-type: none"> <li>Prepare a post-event “thank-you” email to send to participants within two hours.</li> <li>Share post-event communications through email, your website and social media.</li> </ul>
30 minutes	30 minutes	15 minutes	15 minutes	30 minutes
<p><b>Bonus:</b> Include a familiar object or piece of art clients would recognize from your office.</p>	<p><b>Bonus:</b> Leave your camera, lighting and microphone in place once properly set up.</p>	<p><b>Reminder:</b> Submit your revised LinkedIn profile and website bio to compliance today.</p>		<p><b>Bonus:</b> Ask compliance whether you may record and share events with your network.</p>
<p><b>Notes</b></p> <hr/> <hr/> <hr/>				