



FR Marketing Plan

FR Name _____ Date _____

1. Define Vision and Goals

Personal Mission: Why have you chosen this career?

**Business Vision: Who do you want to be in this business? How do you want your clients to see you?
What's Your Personal Career Vision?**

Business Goals

Premium Goals	\$ /week	\$ /month	\$ /90 Days	\$ /Yr 1
Application Goals	/week	\$ /month	\$ /90 Days	\$ /Yr 1
AUM	/week	\$ /month	\$ /90 Days	\$ /Yr 1

Personal Goals

Goals	Completion Date
(Ex. Pay off credit card, Lose 10 lbs., Buy house, Buy new car)	(mm/dd/yyyy)

Weekly Activity Commitments

Activity: Measures of Success	Goals	Other Activity Goals	Goals
Appointments		Names Added to Pipeline	
Quick Facts		Networking Events	
Applications		Social Merdia	
Referrals			

2. Identify Market Groups and Assess Opportunity

After you have entered the information required about each of your contacts into the Natural Market Inventory, click on the "Summary of Market Groups" tab to view the totals of each Market Group. You will notice that this worksheet has been automatically populated based on the information you provided in the previous tab.

Discuss the Summary of Market Groups with your manager to identify two or three market groups that you will focus on for your initial marketing plan.

Market Group (From NMI)	Describe the Opportunity in this Group
(Example): Daycare Workers	<i>(Example) Many are young professionals with families who need and want planning advice.</i>
1	
2	
3	

3. Define Your Ideal Client

As you start to hold Philosophy Meetings and Introductions Meetings with people you know, you will begin to define the people for whom your personality and services are a good fit. Complete the chart below with the characteristics of your ideal client(s). Use the profile to help focus prospecting activities.

Attributes	(Example)	Ideal Profile #1	Ideal Profile #2
Personal/Family (Age, single/married, children)	<i>Married, 35 - 50 years old, preferably with children</i>		
Market/Location	<i>Greater metro area</i>		
Professional/Career (Occupation, education)	<i>Educated, professionals</i>		
Financial Attributes (Income, net worth, savings)	<i>\$100k+ household income</i>		
Financial Needs (Planning, Insurance, Investments)	<i>Life Insurance, Disability Insurance, Improve Cash Flow</i>		
Affiliations (Family, community, professional)	<i>Involved/volunteer in the community in some fashion</i>		
Other	<i>Open-minded Family-oriented</i>		

5. Create Your Model Work Week

(Resource: [Model Week Planning Guide](#))

A model work week helps you stay focused on revenue-producing activities so that you can accomplish your goals. To complete the model week:

- Include any mandatory training and/or meetings.
- Map out time to accomplish the tasks you have outlined in your Action Plan to contact your natural market.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8:00						
9:00						
10:00						
11:00						
12:00						
1:00						
2:00						
3:00						
4:00						
5:00						
6:00						
7:00						