

Build Personality into the Mix

By **Trisha Gallagher Boisvert**

Prospecting ideas come and go, but the best ones stay around year after year.

One way to keep those old ideas fresh is to first consider a healthy mix of activities. For starters, do you have a marketing plan that encompasses a number of strategies and tactics? It's best to have some that target your existing clients, while others warm up prospects for a second appointment, and still others are meant to simply build your image in a given market or community.

Within the mix of strategies, one must next design an array of tactics that appeal to different approach techniques; some aggressive, some more passive. An example of more passive strategies would be direct mail and article placements in association newsletters, while seminars, qualified referral approaches and client appreciation events could be considered more aggressive pursuits of time and money.

Once you feel comfortable with your mix of activities, it's important to think through how you will keep them fresh. Why? Because, if you're not convinced that there is value in where you are investing your time and money for marketing purposes, you will not commit to implementing your plan and you will be no farther along than having never done a plan. Secondly, if you're not convinced that there is value in where you are investing your time and money for marketing purposes--you guessed it--no one else will either.

The best way to keep marketing approaches fresh is to keep them personal. Pick a theme or two that really defines something that you value as a professional, or even as an individual. If family is an overriding source of satisfaction that you value, then build your family into the occasional marketing approach, such as a photo of

your family on a holiday card rather than the less-imaginative corporate cards that are often the choice of uninspired sales people. Talk with the local paper and offer to host a monthly column on finance topics for families. Make sure that you have a good client/prospect tracking system for learning the names and priorities of the family members of the people you serve, and weave those tidbits of information appropriately into all of your approach talks. If you hold a client appreciation day, don't exclude the family members. It may not be practical to include your "theme" in every marketing approach, but striving to include it in half of them is typically a good goal.

Another example of a personal theme to integrate into your marketing mix could be a hobby, like photography. Start by adopting a memorable approach line such as, "I help people keep their financials in focus." Then, build a postcard cultivation program using some of your favorite scenic shots, or host a client appreciation event that features some of your photos displayed at the cocktail

reception. (Not for sale, obviously, but for conversation purposes.) A couple of my clients are currently using their interest in photography to start a photo gallery of their "financially-focused" clients. The idea is to take an "unfocused" photo of a prospect in one of the first meetings (with permission, of course) and then to take a more focused image of the client once she has committed to moving forward with a financial plan. Upon suggestion, the client is then asked if she will mail (or email) the two photos to a few of her friends, along with the financial representative's business card, announcing that she has now taken steps to be "financially in focus."

If meeting more business owners is an interest of yours then show your commitment to them through your mix of "passive" and "aggressive" marketing activities. Perhaps you host a column for a local community group, such as the Rotary or Chamber of Commerce, (or even sponsor it on your own website), titled, "A Day in the Life," and highlight one business owner every month as a result



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of scheduled interviews. Sending links or copies of your column to other business owners will prove to be a nice referral source in time if cultivated correctly. Weekly, glean your community's business papers for relevant articles of interest and make a point to mail these clippings with a personal note. Send congratulatory cards on a business's anniversary, or even better, take out a small ad congratulating the business and the business owner by name in the local paper.

Two messages worth repeating: Do you have a nice mix of activities for accessing your target market? Have you blended your personal theme into as many marketing communications and activities as possible to keep your approach interesting and conversational? Too often I work with companies or financial representatives who profess to be committed to a certain market, and yet there is little, if any, reference on their website or within their marketing brochures.

Don't be afraid to profess your commitment to a market or share an aspect of your personality with your prospects and clients. In the end, you will be more likely to enjoy your marketing pursuits, you will find relationship-building conversations come more easily, and your clients and prospects will appreciate the fresh and personal approach. ♦

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