



SERVICES

## Marketing Strategy

You wouldn't invest a portfolio without a plan—why would you spend money on marketing without one, too? Our Strategy services help you truly get more from your marketing.

dgo

*Get in touch!*

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MARKETING PERFORMANCE REPORT

# Spend Your Marketing Dollars More Wisely

Our Marketing Performance Report provides a comprehensive assessment of your current marketing performance, plus actionable recommendations to help you improve your investment choices.

One

## GATHER DATA

We'll request credentials or data feeds from several sources.

### Core Data Sources

- Google Analytics
- Search Engine Console
- All social media profiles
- All digital ad accounts
- CRM and lead tracking tools
- Email marketing tools
- Other relevant marketing channel data specific to your firm (e.g., radio, TV, niche or non-traditional publications, third party marketing software or solution providers)
- DGO will provide SEO and PR reporting tools

Two

## AI & HUMAN ANALYTICS

### Core Assessments

- We use Datorama, a Salesforce solution that provides integrated reporting and AI analytics for attribution patterns
- Our internal and external teams offer unparalleled depth of experience in both financial services marketing and specific marketing channels. We work together to generate conclusions, recommendations, and new ideas from the data.

Three

## REPORTING & ACTION STEPS

### Key Deliverables

- A comprehensive look into your current marketing program
- Our top five recommendations for how to optimize your marketing investment

Quick Note

As part of my commitment to your success, I want you to be able to assess your performance over time.

To make that possible, we offer all strategy clients free access to our Datorama reporting portal for one year following our engagement. This software normally runs \$36,000/year—it's an extraordinary value.



Please schedule a call for more details!

Schedule now

MARKETING STRATEGIC PLAN

# Build a Marketing Program That Works

Our Strategic Plan service embeds the Performance Report into the big picture of where your business wants to go and how marketing can help you get there. Do not waste another dollar on marketing: invest in a strategic plan that can continue to deliver value for years to come.

One

## HALF-DAY DISCOVERY SESSION

### Key Topics

- Core business objectives and pain points
- Client profiles, sales/retention, client life cycle
- Key competitive advantages and pressures
- Service delivery infrastructure
- Marketing infrastructure

Two

## PERFORMANCE ASSESSMENT & PLANNING

### Data Gathering

Same as our Marketing Performance Report, we aggregate data from all digital and traditional sources

### AI + Human analytics

Combining Datorama's AI with our team's unparalleled experience

### Primary Research

We partner with a specialist to help us conduct primary research with clients and partners

### Business Goals Synthesis

Review our findings against industry trends and competitive pressures

Three

## MARKETING STRATEGY DELIVERY

### Core Deliverables

- Budget recommendation
- Technology and infrastructure
- Core audiences and targeting strategies
- Core messaging and positioning to trial run
- Where to invest and where not to invest
- How to assess performance
- Expected timeline for success

Four

## IMPLEMENTATION WORKSHOP

### Half-Day Session Topics

- Presentation of recommendations
- Step-by-step implementation plan
- Training and process recommendations
- Referrals to service providers (we never take kickbacks, these are just good people we like and respect)

Quick Note

Our conversations will resemble the kind you'd have with a management consultant. Most marketers never go this deep, but I consider it my responsibility to help you grow revenue and profitability.



Please schedule a call for more details!

Schedule now

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*Ready to get started?*

SCHEDULE A CALL

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