

MARKETING MADE

EASY

Advisor Success | Market Research | Monthly Updates

DON'T 'FALL' BEHIND IN THE FOURTH QUARTER!

It's fall again! The leaves are changing, the weather is getting colder, and most people are ready to hunker down and relax by the fireplace. You might be tempted to do the same – but this season is not the time for you to slow down!

It's time to get organized and make improvements that will pay dividends in the new year. Doing a little fall cleaning now will help you streamline everyday operations, identify areas of trouble, and breathe new life into your firm.

Here are a few suggestions:

Audit Your Website

Your firm has probably grown and changed a lot over the past year, right? Is your website up to date? If you let much-needed changes fall through the cracks, your site can start to collect dust.

That's why now is the time to audit your website. Maybe you have some content that needs to be rewritten or freshened up. Maybe your site is looking a little outdated. Fixing minor details can make a significant impact.

Don't forget about SEO! When was the last time you checked your site's search ranking? Consumers' online habits are always changing, and search engines constantly shift algorithms, so make sure you're reviewing how your pages are performing consistently. That way, you can make small tweaks in real time.

Brush Off Your Business Strategy

When was the last time you looked at your business strategy? Now is the perfect time to dust off your plans and take a deeper dive. Businesses constantly develop and change. Your business plan should do the same.

Set aside time at the end of each year to make sure you're still on track with your goals. Reflect on the past year and ask yourself what kind of changes your firm has made. Did you add or remove products or services? Are you targeting a new market? Did you restructure aspects of your business? If you made any changes, be sure to update your plan.

Tidy Your Firm's Books

The end of the year is the optimal time to tidy your firm's books! Your accounting books are the foundation for your firm's transactions and financial records. They can help you forecast your financial future and make the right decisions about spending your money. Organize your books, review files, sort receipts, and digitize what you can. Be sure to keep your business and personal expenses separate.



Refresh Your Marketing Campaigns

Now is the time to reflect on the marketing strategies you used this year, and if they worked for your firm. Just like your business, marketing tactics are constantly changing. These days it seems like a new marketing trend is popping up every day. That doesn't mean you have to try everything - but you should review your current marketing campaigns and implement new strategies in the new year.

Spruce up your marketing campaigns by:

- Investing in social media campaigns.
- Analyzing last year's data.
- Conducting a brand review.
- Hosting new client events.
- Researching marketing trends.
- Utilizing email marketing.

Declutter The Office

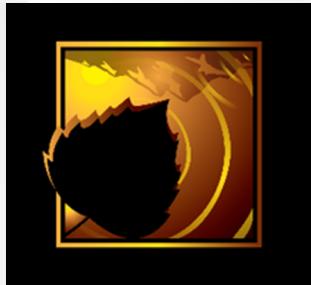
It's time to organize those back closets and give your office a deep end-of-year cleaning! Doing some decluttering, both physically and digitally, will benefit you in the long run. After all, tossing out trash, dusting, and vacuuming never hurt anybody. Organizing your workspace will help you start the new year off right. Not only will your office look better, but you'll feel better too!

Organize Your Inbox

It's easy to fall behind on your emails, paperwork, and other documents during the year. Use this time now to go through items that have been piling up. Delete or archive old messages, unsubscribe from unnecessary newsletters, and make sure your email folders are up to date!

While you're cleaning out your inbox, you can also do some other digital cleaning. Go through old folders on your computer and delete unnecessary documents and folders.

Don't let the fourth quarter be the time when you fall into bad habits. Get organized now so you can ring in a wonderful new year!



ASPEN CREEK
WEALTH STRATEGIES



MONTHLY MEGAHIT

Kelly Fasterling

Each month, we like to feature an advisor that's doing exceptional work. This month we've chosen to feature Kelly Fasterling, who lives and works in the Colorado Springs area. Kelly works to educate her clients on strategies to help maximize benefits and try to create peace of mind for those at or near retirement.

Primary Coach Rick Bates had this to say:

"Kelly is just getting started on learning the Scranton Sales Process, but she is quickly becoming a student of the process. Her studiousness and participation efforts are second to none. I'm sure her dedication will pay big dividends in the future."

Well done, Kelly, and best wishes for much success ahead!