

**Merrill Lynch**  
Marketing Center

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# Homepage Goal Based


John Doe | New York, NY, 10:12 am, 52<sup>0</sup>

ORDERS
CLIENT SERVICES
MARKETS & INVESTMENTS
MARKET TOOLS
RESEARCH
PRODUCTS & SERVICES
MERRILL RESOURCES
MARKETING CENTER
WIMW INFORMATION
BRANCH MGMT/OPS

## Marketing Center

All Sites

Search

Home
Planning
Acquisition
Retention
Broadening Relationships
Resource Library

### Welcome to Marketing Center

The Marketing Center is your gateway to tools and ideas you can use to find prospects, acquire clients and grow your practice. For marketing materials related to specific products and services, visit the [Products & Solutions Web site](#). You can also access the [Wealth Management Tools](#).

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### Spring Issue of Advisor: Women & Money—Now Available in Print and Online



The latest issue of Advisor helps answer critical questions women have today about retirement planning, including how to afford health-care and avoid outliving their assets. In addition to strategies and solutions for this vital client base, the issue includes timely articles on the U.S deficit, new tax law changes, and an interview with Bank of America CEO Brian Moynihan.

*Tools you can use now:*

- Advisor Web site:** Share links with clients and prospects to all the articles in the issue, plus find additional content and interactive features at [www.ml.com/mladvisor](http://www.ml.com/mladvisor).
- FA Guide:** Visit the [Advisor Magazine Section](#) on Marketing Center for an electronic version of the FA Guide and approved letters to send to clients and prospects.
- Free Copies of Advisor:** Order 25 free copies of the print magazine at [Materials Online](#).



**Spring Issue of Advisor: Women & Money—Now Available in Print and Online**

**THE POWER OF THE RIGHT ADVISOR.™**

Merrill Lynch Wealth Management Launches New Brand Platform

**Advisor Profiles Networking Site Launches for FAs and PWAs**

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### WEBCAST UPDATES AND BEST PRACTICES

Learn how to use retirement and thought leadership Webcasts to drive your business.

[Learn More](#)

**Latest Webcast:**  
Women & Retirement: Investing for the Life You Want



**HANNA ROSIN**  
Contributing Editor  
*The Atlantic*

[Watch Webcast](#)

### I want to....

- [> Download marketing materials](#)
- [> Develop a client acquisition strategy](#)
- [> Access resources for servicing clients](#)
- [> Build a cross-sell strategy](#)
- [> Create a bio/value proposition](#)

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## THE POWER OF THE RIGHT ADVISOR.™

[View Current Campaign](#)



### Manager's corner



View the latest brand campaigns in market and access Manager tools and resources to support branch administration.

[Go](#)

### Resource library

Quickly access the marketing tools and resources you need to build your business:

[Fact Sheets](#)

[Letters](#)

[Local ads](#)

[Brochures](#)

[Seminars](#)

[Bylined articles](#)

[Core Tools](#)

[Thought Leadership](#)

[Go to Resource Library](#)

### Quick links

- [ask Ask Merrill](#)
- [MOL Materials Online](#)
- [AG GWM Advice and Guidance](#)
- [IMG GWM IMG](#)
- [P&S Products & Solutions](#)
- [WMT Wealth Management Tools](#)

### Where to go for help



Contact the Marketing Help Desk at **377.465.9435**. Say "Materials Online" and you will be connected to a representative.

Help Desk hours are from 8.30 AM to 6.30 PM

[Feedback](#) | [Contact Us](#) | [Help](#)

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## Marketing Center

All Sites
  Current Site

Home	<b>Planning</b>	Acquisition	Retention	Broadening Relationships	Resource Library
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OMP Development	Analyze Your Strength/Challenges	Segment Your Clients	Create Your Bio/Value Proposition	Build a Marketing Plan	PMD
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### Planning

The foundation of a sound marketing strategy consists of developing a plan that incorporates your optimal book size, target client and service model. This section addresses the importance of understanding your firm's strengths and challenges, clearly articulating your practice's value proposition and optimizing your book of business in order to focus on your target prospects and segments.

#### OPM Development

Enhance your firm performance by adopting the Optimal Practice Model, a framework developed by analyzing the practices of Merrill's best advisors to help you deliver a compelling and consistent client experience—from your first client to your last.

**Optimal Practice Model**

Business Management	Business Development	Planning
Investments/Financing	Relationship Management	Service & Administration




[Learn More](#)

#### Realize your marketing goals


Find the tools and resources you need to support your evolving marketing objectives:

- [> Raise firm awareness](#)
- [> Create new client opportunities](#)
- [> Convert prospects](#)
- [> Generate referrals](#)
- [> Increase client loyalty](#)
- [> Expand existing client relationships](#)

#### Tools and resources

-  [OPM Framework](#)
-  [Bio/Value Proposition Worksheet](#)
-  [Sample Marketing Plan](#)

#### Where to go for help

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#### Analyze Your Strength/Challenges

Understanding your capabilities and the environment in which you operate is key to identifying opportunities that satisfy unfilled client needs. Conduct a situation analysis to reveal gaps between what clients want and what you currently offer them.

[Learn More](#)

#### Segment Your Clients




Identifying your ideal client is a key component to building an effective marketing strategy and foundational to your value proposition. Client identification involves not only proactively transitioning clients to the right channel, but also segmenting and targeting the right clients to ensure the highest profitability of your practice.

[Learn More](#)

#### Create Your Bio/Value Proposition

Your value proposition is essential to an effective marketing strategy and is based on a thoughtful evaluation of your core strengths and client-centric services. Your value proposition is integral to a well thought-out marketing plan.




[Learn More](#)

#### Build a Marketing Plan

Establishing a marketing plan is crucial as it serves as the roadmap to achieving your marketing objectives, detailing your tactics and plan of execution.


[Learn More](#)



Use the Marketing Plan Builder to guide you through every step of creating a strategic marketing plan.

[Get Started Now](#)

#### PMD Resources



Establishing a new practice is no easy feat. Strengthen your marketing know-how with access to marketing best practices, tools and resources to help you build your business.

[Learn More](#)

## INTERACTION NOTES

# Build a Marketing Plan

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OMP Development Analyze Your Strength/Challenges Segment Your Clients Create Your Bio/Value Proposition Build a Marketing Plan PMD

### Build a Marketing Plan

Creating a robust marketing plan requires detailed planning consideration. This section outlines each building block of a marketing plan.

#### Steps to Developing a Marketing Plan

A marketing plan is a written document that outlines the activities and resources necessary to achieve one or more marketing objectives (like acquisition or retention). A sound marketing plan is structured around your value proposition, outlines all client communication touchpoints and defines clear success measures for each effort.

Developing a marketing plan typically involves the following steps:

**STEP 1 Set goals and objectives**

Once you have assessed and documented your firm's strengths, ideal target client and value proposition, the next step is to articulate and drill down on marketing goals to a sufficient level of specificity. Things to consider include:

- Should the focus be acquisition, retention, cross-sell or a blend?
- What is the prioritization in order of need? It is also important to ensure that the prioritization of your marketing goals aligns with your firm's business goals.

Download the [Business Goals Worksheet](#) to help you translate your business goals into concrete marketing objectives.

**STEP 2 Develop marketing tactics**

Following goal setting is determining the right mix of marketing tactics that will achieve your firm's marketing objectives. Consider the following:

**ACQUISITION**

- Understand the strength of your own networks (social and professional) and how to build and leverage them
- Do your research and build a prospect pipeline; learn to manage it
- You don't need to do everything: Define a mix of tactics that reinforce each other and suit your personal style
- Start with the basics: things which are automated and layer on more labor intensive efforts

**RETENTION**

- Talk to clients: do you have a retention problem or opportunity?
- Analyze your communications (frequency, type) from a client POV
- Develop a contact/content strategy that fits your style AND can flex to client preferences
- Take advantage of all content available to you first
- Use automation, CRM and reminders

**BROADENING RELATIONSHIPS**

- Are you having on a regular basis the quality of conversations that uncover needs, goals, pain points or dreams?
- Is there a common need that can be served more broadly?
- Look at your book and define the product/service set that is held by your ideal client
- Consider partnering for needs that imply products or services that may not be your strong suit

Download the [Marketing Tactics Worksheet](#) to help you document the marketing activities and resources that align with your goals.

For more information on what marketing activities are appropriate for effectively achieving particular goals visit the [Acquisition](#), [Retention](#) and [Broadening Relationships](#) pages.

**STEP 3 Determine rollout schedule**

After you have determined the right marketing tactics, the next step is to map each activity out in a master calendar. This will help identify any resource or interdependency issues so you can address them up front. Things to consider include:

- What is the optimal timing and sequence for rolling out the tactics over the course of a year?
- What is the frequency of each tactic (one time or repeat)?
- Who will own each tactic and be accountable for its execution?

Download the Marketing Calendar Template to create a master schedule of your planned marketing activities.

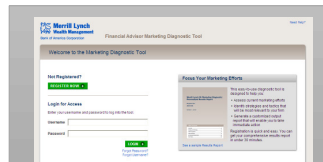
**STEP 4 Implement the plan**

Once your rollout schedule is in place, now it's time to execute.

Things to consider include:

- What are the practical (time, budget, complexity) considerations in the selected tactics?
- What are the most important criteria for you to prioritize them?
- What are the steps to get them done?

## INTERACTION NOTES



### Create a Roadmap to Your Success

Use the Marketing Plan Builder to guide you through every step of creating a strategic marketing plan.

[Get Started Now](#)

#### Key Benefits:

- An effective marketing plan to help grow your business
- Focus and prioritization of marketing activities to achieve your goals
- Simple and easy step-by-step guide

#### Tools and resources

- [Sample Marketing Plan](#)
- [Business Goals Worksheet](#)
- [Marketing Tactics Worksheet](#)
- [Marketing Calendar Template](#)
- [Marketing Metrics Worksheet](#)

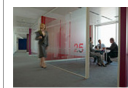
#### Optimize Your Practice



Learn how the Optimal Practice Model can help to grow your practice.

[Go](#)

#### Build a Solid Foundation



Get on the fast-track to establishing your practice with access to PMD resources

including marketing best practices, tools and resources to help you build your business.

[Go](#)

#### Where to go for help



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# Acquisition

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## Marketing Center

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Home Planning **Acquisition** Retention Broadening Relationships Resource Library


Raising Awareness Prospecting Conversion & Onboarding Referrals

### Acquisition

Client acquisition is about more than just lead generation, it is the practical application of your value proposition and how you use it to grow your book of business. It's also about raising awareness of your practice among your community and target client base. Clear articulation, belief and execution around your value proposition are at the core of a sound client acquisition strategy.

#### Raising Awareness


Explore ways to keep your firm top of mind among target clients and increase visibility of your firm in your community.



Learn More

#### Prospecting

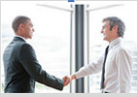
Acquire new clients through the generation and management of qualified leads and creating new client opportunities.



Learn More

#### Conversion & Onboarding


Converting prospects into clients can be challenging and it can take time to obtain a commitment. Discover ways to make the process more efficient and ensure the onboarding process is a smooth transition.



Learn More

#### Referrals

It is important to have a referral strategy and process for acquiring new clients. Asking for referrals, or qualified introductions through your current contacts is a key way to develop your business.



Learn More

#### Resource library

Quickly access relevant marketing materials to support your goal of client acquisition.

- Fact Sheets
- Letters
- Local ads
- Brochures
- Seminars
- Bylined articles
- Core Tools
- Thought Leadership

Go to Resource Library

#### Where to go for help

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Raising Awareness Prospecting Conversion & Onboarding Referrals

### Prospecting

Prospecting is a targeted, goal-based effort dedicated to new client acquisition, and it encompasses the generation and management of qualified leads. Related activities include webcasts, seminars and events, tradeshows and direct mail. Click on a tab to learn more.

Webcasts Seminars & Events Tradeshows Direct Mail

#### Overview

[Webcast Best Practices & Resources](#)

[National Webcast Advertising](#)

[Webcast Archive](#)

#### Webcast Schedule

Next Webcast

 **Women & Retirement: Investing for the Life You Want**

An On-Demand Event  
June 5, 2011

[Invite Clients](#)

Replay the Latest Webcast

 **How Can You Prepare for a Tax Hike?**

[Notify Clients](#)

#### Webcast Overview

Merrill Lynch has launched a series of webcasts to help you increase the number of contacts with existing clients and to aid you in prospecting efforts.

#### How Webcasts Lead to Contacts

Webcasts can help you deepen relationships through contact before and after the event. Research shows that clients expect between 24 and 26 touch points from their FA per year\*. Our best practices roadmap demonstrates how to use Webcasts to meet this goal.



Get My Road Map >

Get the most out of each webcast with step-by-step road map of best practices:

- [Pre-Webcast](#)
- [Day of Webcast](#)
- [Post-Webcast](#)

#### Key Resources

-  [Webcast Playbook](#)
-  [Webcast FAQs](#)
-  [Financial Freedom Checklist](#)
-  [Unlock Your Retirement Thinking](#)


#### Where to go for help

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Resource Library

Marketing Materials and Templates
Core Tools
Thought Leadership

### Resource Library

The Resource Library contains marketing materials and templates, core tools and Merrill Lynch thought leadership all in one centralized place—to help you grow your practice.

#### Search

Filter by Select All | None

**Type**

- Seminar
- Letter
- Ad
- Presentation
- Bylined Article
- Brochure
- Foot

**Goal**

- Acquisition
- Retention
- Expanding Relationships

**Product**

- Credit and Lending
- Philanthropy
- Liquidity
- Wealth Management
- Banking
- Business Solutions
- Investments and Advice
- Value-based Investing
- Retirement

**Niche/Segment**

- LGBT
- Women
- Special Needs
- Native American
- Life Events
- Business Owners
- UHNW


**File Type**

- PDF
- PPT
- Word

#### Marketing Materials & Templates

Download the resources you need to support your marketing activities.

- [Letters](#)
- [Brochures](#)
- [Fact Sheets](#)
- [Local Ads](#)
- [Seminars](#)
- [Presentations](#)
- [Bylined Articles \(MoneySense\)](#)



[View All](#)

#### Most Downloaded

Download the resources you need to support your marketing activities.

- 1 [Webcast Playbook](#)
- 2 [Webcast FAQs](#)
- 3 [Seminars Best Practices Guide](#)

#### Recently Updated

- \* [CPM Designation Letter](#)
- \* [U.S. Treasury Inflation-Indexed Securities Letter](#)
- \* [Solutions for Liquidity Prospecting Letter](#)

#### Core Tools

Find the tools you need to support your marketing efforts.


<a href="#">Perspectives Newsletter</a>	<a href="#">MyMerrill.com</a>
<a href="#">Presentation Builder</a>	<a href="#">IMC</a>
<a href="#">MOL (Materials Online)</a>	<a href="#">eSuites</a>
<a href="#">FA.com</a>	<a href="#">Marketing Plan Builder</a>
<a href="#">Branch.com</a>	<a href="#">Advisor Profiles</a>

[View All](#)

#### Thought Leadership

Share firm articles, research and insights with your clients.

- [ML Advisor Magazine](#)
- [Perspectives Newsletter](#)
- [UHNW Insights](#)
- [ML Affluent Insights Quarterly](#)
- [Webcasts](#)
- [Translated Research](#)
- [Broadcast Archives](#)



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#### webcasts

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 prospecting letters  
 research  
 UHNW Perspectives CA View

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Referrals and Networking ▾
Marketing Communications ▾
Resource Library ▾

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June 30, 2011

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*Tools you can use now:*

- Advisor Web site: Share links with clients and prospects to all the articles in the issue, plus find additional content and interactive features at [www.ml.com/mladvisor](http://www.ml.com/mladvisor).
- FA Guide: Visit the [Advisor Magazine Section](#) on Marketing Center for an electronic version of the FA Guide and approved letters to send to clients and prospects.
- Free Copies of Advisor: Order 25 free copies of the print magazine at [Materials Online](#).

**Meeting Women's Unique Financial Needs**

Women earn more than \$1 trillion annually and start businesses at twice the rate of men....

**FA.Com Enhancements**

Based on FA feedback, FA.com has been improved to bring you more flexibility....

**Merrill Lynch Wealth Management Launches New Brand Platform**

The Power of the Right Advisor™—the new Merrill Lynch Wealth Management brand...

**Advisor Profiles Networking Site Launches for FAs and PWAs**

Advisor Profiles is an internal networking website designed to help advisors...

#### Webcast Updates and Best Practices

**Latest Webcast:**  
Women & Retirement: Investing for the Life You Want

ROBIN HARKIN  
Contributing Editor  
The Atlantic

Learn how to use retirement and thought leadership Webcasts to drive your business.

[Learn More](#)

**UPDATED! Market-Linked Investments Materials**

Market Downside Protection

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Are Not Deposits | Are Not Insured by Any Federal Government Agency | Are Not a Condition to Any Banking Service or Activity

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# Marketing Basics

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### Marketing Basics

Marketing and business development can be a challenging pursuit. This section will help you understand the marketing basics and provide you with tools and resources to help you grow your practice.

#### Marketing Strategy Development

High performing advisors depend on a sound marketing strategy to help them grow their practice. Get guidance and access to information and resources that can help you build an effective marketing strategy.

[Learn more...](#)

#### Marketing Strategy Tools

Leverage the following tools to support the development of your marketing strategy:

##### Marketing Plan Builder

A powerful and easy to use tool, designed to guide you through each step of creating a strategic marketing plan.

[Get Started](#)

##### Advisor Profiles

An internal networking website designed to help you identify other advisors for situational teaming or full teaming.

[Get Started](#)

#### OMP Development

Business Management	Business Development	Planning
Investments/Financing	Relationship Management	Service & Administration

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[Learn more...](#)

#### PMD

Establishing a new practice is no easy feat. Strengthen your marketing know-how with access to marketing best practices, tools and resources to help you build your business.

[Learn more...](#)

## INTERACTION NOTES

#### Marketing Diagnostic Tool [Need Help?](#)

This easy-to-use diagnostic tool is designed to help you:

- Assess current marketing efforts
- Identify strategies and tactics that will be most relevant to your firm
- Generate a customized output report that will enable you to take immediate action

Registration is quick and easy. You can get your comprehensive results report in under 30 min.

[Register Now](#)

[See a Sample Results Report](#)

#### Login for Access

User Name

Password


Forgot your Username or Password? [Login](#)

#### Resource Library [Go](#)

Quickly access the marketing tools and resources you need to build your business:

<a href="#">Letters</a>	<a href="#">Bylined articles</a>
<a href="#">Local ads Seminars</a>	<a href="#">Brochures</a>
<a href="#">Presentation Tools</a>	<a href="#">Fact Sheets</a>
	<a href="#">ML Research and Insights</a>

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# Marketing Basics - Navigation

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**Marketing Strategy Development**

- Analyze Your Strength/Strategies
- Segment Your Clients
- Create Your Bio/Value Proposition
- Build a Marketing Plan

**OMP Development**

**Marketing Strategy Tools**

- Marketing Plan Builder
- Advisor Profiles

**PMD**

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Business Management	Business Development	Planning
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[Learn more...](#)

### PMD

Establishing a new practice is no easy feat. Strengthen your marketing know-how with access to marketing best practices, tools and resources to help you build your business.

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**Marketing Diagnostic Tool** [Need Help?](#)

This easy-to-use diagnostic tool is designed to help you:

- Assess current marketing efforts
- Identify strategies and tactics that will be most relevant to your firm
- Generate a customized output report that will enable you to take immediate action

Registration is quick and easy. You can get your comprehensive results report in under 30 min.

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**Where to go for help**



Contact the Marketing Help Desk at **377.465.9435**. Say "Materials Online" and you will be connected to a representative.

Help Desk hours are from 8.30 AM to 6.30 PM

# Marketing Strategy Development

**GWIM** John Doe | New York, NY, 10:12 am, 52°

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### Marketing Strategy Development

The foundation of a sound marketing strategy consists of developing a plan that incorporates your optimal book size, target client and service model. This section addresses the importance of understanding your firm's strengths and challenges, clearly articulating your practice's value proposition and optimizing your book of business in order to focus on your target prospects and segments.

#### Analyze Your Strengths/Challenges

Understanding your capabilities and the environment in which you operate is key to identifying opportunities that satisfy unfilled client needs. Conduct a situation analysis to reveal gaps between what clients want and what you currently offer them.


[Learn more...](#)

#### Segment Your Clients

Identifying your ideal client is a key component to building an effective marketing strategy and foundational to your value proposition. Client identification involves not only proactively transitioning clients to the right channel, but also segmenting and targeting the right clients to ensure the highest profitability of your practice

[Learn more...](#)

#### Create Your Bio/Value Proposition



Your value proposition is essential to an effective marketing strategy and is based on a thoughtful evaluation of your core strengths and client-centric services. Your value proposition is integral to a well thought-out marketing plan.

[Learn more...](#)

#### Build a Marketing Plan

Establishing a marketing plan is crucial as it serves as the roadmap to achieving your marketing objectives, detailing your tactics and plan of execution.

[Learn more...](#)


Use the Marketing Plan Builder to guide you through every step of creating a strategic marketing plan.

[Get Started](#)

## INTERACTION NOTES

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# Marketing Communications


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## Marketing Communications

### Direct Mail



Direct mail can play a key role in your prospecting efforts. Learn how to create a successful direct mail campaign that can help engage prospects and encourage client or prospect communication.

[Learn More...](#)


### Brochures

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### Letters



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### ePublications

Clients are demanding increased transparency and communication from their FAs. Use ePublications such as Perspectives, as a touch point to help communicate the view points of Merrill Lynch's top thought leaders and as a result, aid in client understanding of their needs and your products.

[Learn more...](#)

### Social Media



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[Learn more...](#)

### Local Ads

Local advertising can generate awareness of your practice, showcasing your capabilities and reinforcing the Merrill Lynch brand. Used appropriately, local ads can be a powerful business building tool.

[Learn more...](#)

### Press Releases

Press releases are an effective way to share important news with your community and generate awareness for the Merrill Lynch brand among local influential audiences, including clients and prospects.

[Learn more...](#)

### Bylined Articles

A variety of personal finance articles authored by Merrill Lynch senior management that you can send to local and regional newspapers, community newsletters, as well as trade and business publications






[Learn more...](#)

### Web Tools

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**Latest Webcast:**  
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**HANNA ROSIN**  
Contributing Editor  
*The Atlantic*

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