

GETTING STARTED WITH

**bamboo**<sup>SM</sup>  
by eMoney



According to a study by InvestmentNews, 74 percent of new clients are self-directed investors who decide to start working with an advisor.<sup>1</sup> These individuals have grown up in the digital age with instantaneous access to information. They're used to researching information and finding answers on their own.

Reach prospects and engage clients with Bamboo—digital marketing technology designed to help you accelerate growth and deepen client relationships.

In this guide, you'll learn a simple approach for getting started with your Bamboo toolkit, as well as the essential steps for creating a marketing plan to achieve your business goals.

<sup>1</sup>2017 InvestmentNews Adviser Technology Study, March 20, 2017.

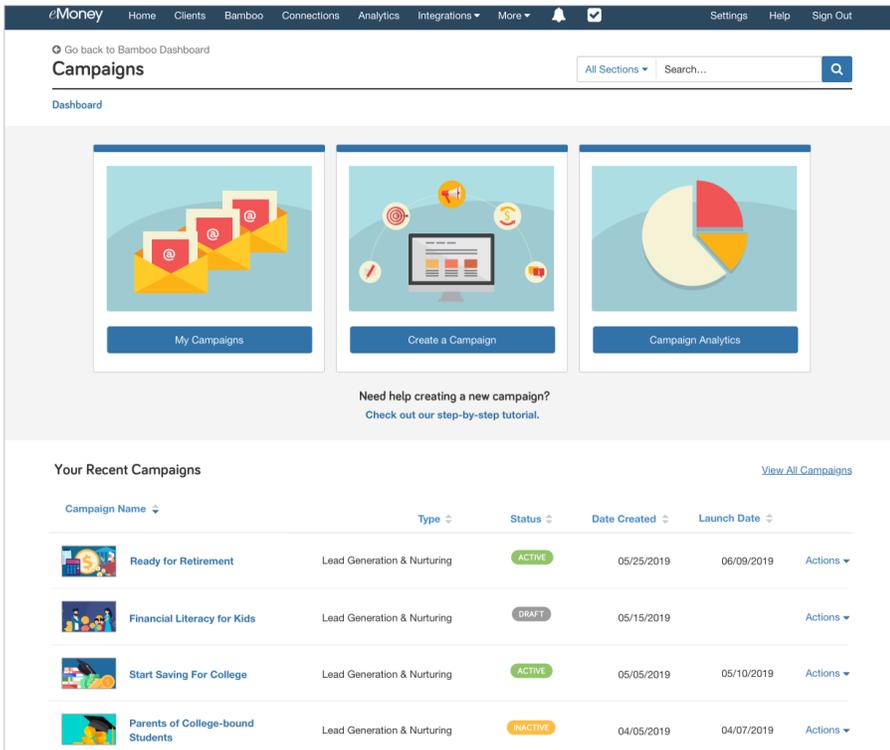


# Getting Started with Bamboo

Follow these simple tips to configure your Bamboo toolkit.

## Customize Your Share Pages

Before using Bamboo, take a few minutes to customize your content share page, through which prospects and clients will view your content.



*The following preferences can be configured through the **Settings** link on the top navigation bar of the Advisor dashboard.*

*Note: The following settings are configured under the Advisor license.*

- Review your contact information available within **My Info > Basic tab**. Requests for changes to your contact information should be sent to [CustomerService@emoneyadvisor.com](mailto:CustomerService@emoneyadvisor.com).
- Add your disclaimer in the field for Footer 1 or Footer 2 within **My Info > Broker Dealer tab**.
- Confirm your logo is uploaded through the Branding section.

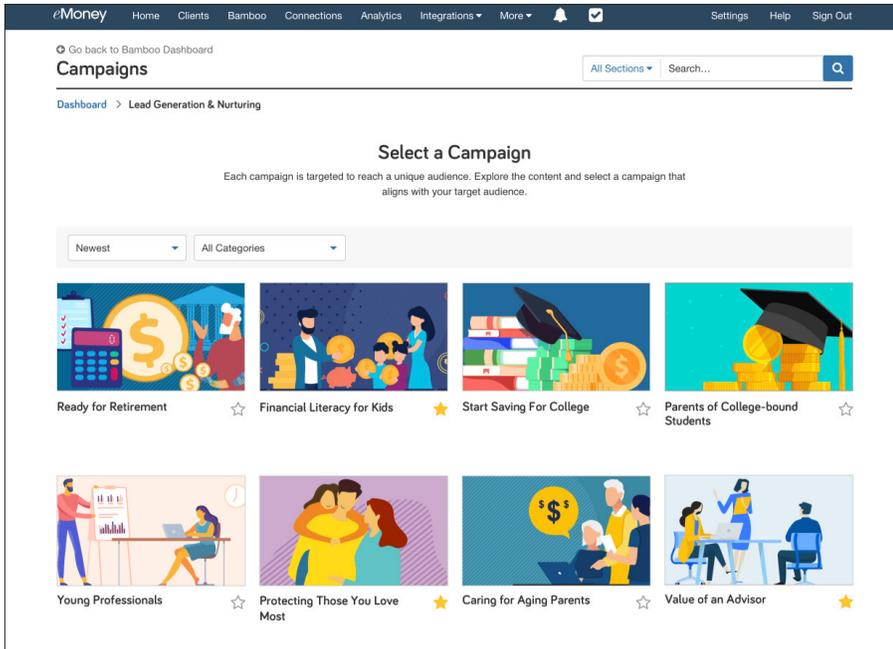
## Enable Access for Support and Marketing Specialist Users

Before a Marketing Specialist can manage Bamboo on behalf of an Advisor, the Advisor must share their clients with the Marketing Specialist. This is setup from the Sharing Rules within the Settings area of their Advisor Dashboard.

Support users (Planners and Assistants) who are set up as delegates can also access Bamboo. Delegation is also configured through the Sharing Rules within the Settings area of your Advisor Dashboard.

## Source Your Content

Become familiar with how content is organized to easily find what you need, when you need it.



### ✔ Campaigns

Schedule and launch targeted content campaigns to generate and nurture leads through digital channels—in just a few clicks. These kitted campaigns give you everything you need so you don't have to worry about sourcing or creating content. And the fully automated workflows eliminate the manual task of following up to nurture prospects.

### ✔ Content Library

A full collection of topical content to engage prospects or clients on matters that are most relevant to their personal and financial lives. Articles related to current events and the markets are released weekly to the "Featured" section, which also includes the most recent content. As new articles are released, older articles are moved to the Industry Insights section so they are always available.

### ✔ Emails

Access email templates for life events, financial milestones, and holidays to stay top of mind with clients. You can also create your own email with a custom header image or attach content items from the Content Library or your desktop.

# Creating a Marketing Plan

Your configurations are set and you understand the basics for finding content. But are you unsure of which content to share, how often to share it, and which channels to use? If this is the case, you're not alone.

Many financial advisors are unsure of where to begin. The best way to start is to create a marketing plan. By spending time up front thinking strategically about what you want to achieve, you can save time and guide your efforts to meet your goals. In this section, you'll learn the essential steps for creating a marketing plan. You might notice that the foundation mirrors the same process used to create financial plans.

## 1. Discover and Document Your Strengths

Take a bird's eye view of your current marketing efforts and client base to identify your strengths. What's working well? Your strengths may include hidden opportunities that can be tapped in the future. For example, do you actively send client communications and have a strong readership? Have you recently updated your website and already have strong web traffic? Is your client base comprised of a niche target market? Don't over think it! Jot down what comes to mind.

## 2. Set Your Objectives

Now, think about what is most important to your firm right now. It may be that generating new business is important or retaining current clients is a priority. If you're looking for ideas, reflect on any gaps that you see in your current marketing efforts. It may be that you are already aware of what you want to fix and can transform those obstacles into objectives. You should focus your efforts on goals that are specific, measurable, attainable, relevant, and timely (SMART). For example, a SMART business generation goal might be to add five new clients per quarter.

## 3. Create a Strategy

Once you decide what you want to achieve, you need to create the plan to get there—this is your strategy. Remember those strengths that you previously defined? This is where they come in handy. Try to leverage your strengths to achieve your goal. You may find that it takes several strategies to reach your goal.

## 4. Define Your Tactics

For each strategy, lay out the action steps needed to execute that strategy. If you're confused about the difference between a strategy and a tactic, you're not alone. The strategy is your plan. Your tactics are the steps that make up the strategy.

## 5. Implement Your Plan

Your goal, strategy, and tactics are defined. Now it's time to implement your plan. Be sure to determine which team members will be responsible for completing each action item. It's also a good idea to share the plan with the team, even if members are only responsible for completing certain tactics. By understanding the larger plan, members will understand how their area of responsibility contributes to the whole. It will also help them address any questions they may receive from clients or prospects.

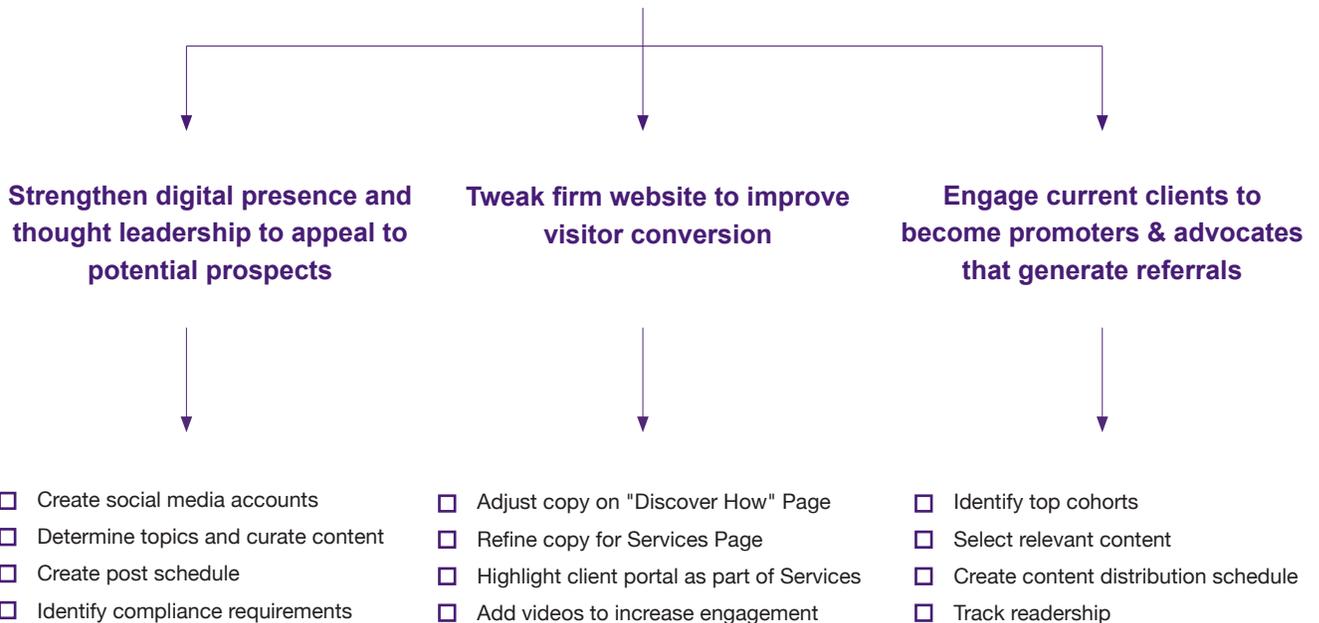
## 6. Track the Results

Seeing the results of your marketing efforts will take time. That's why it's important to define metrics for each strategy so you can measure your success. By tracking performance, you gain insights into where you might need to make adjustments to increase your success.



## EXAMPLE MARKETING PLAN

### Add 5 New Clients Per Quarter



Create your marketing plan today by completing the Marketing Strategy Worksheet

STRENGTHS	GOAL

<b>STRATEGY 1</b>	
Tactics	
<b>STRATEGY 2</b>	
Tactics	
<b>STRATEGY 3</b>	
Tactics	

Be sure to check the Help menu for more learning resources.