

MARKETING ASSISTANT-INTERNSHIP

BELL & WRIGHT FINANCIAL GROUP



Northwestern Mutual®

Securities Registration Not Required | Non-registered fingerprinted (NRF) person

WAGE= \$18/HR

ENVIRONMENT: IN OFFICE (HYBRID/REMOTE POTENTIAL)

OVERALL FUNCTION

The Marketing Assistant focuses on successfully marketing the financial representative to keep him/her in constant selling situations and assists in all marketing related activities, developing and implementing new promotional and marketing programs and developing and executing cross-selling plans for existing clients. Specific responsibilities may include, but are not limited to:

MARKETING

Segmentation

- Work with the advisor to define ideal clients for each marketing segment and refine regularly
- Drive efforts to segment the overall client base to be able to effectively execute a client touch plan and drive the goals of the practice
- Record segments within the client management system and maintain them
- Determine a strategy to support lower segment clients, which may include succession planning, joint work or perhaps transitioning clients to the Client Relations Center
- Develop a focus list of clients to connect with within the next 6 months
- Develop a process to obtain client preferences and track within the client management system

Prospecting

- Create, document and drive execution of a referral process
- Identify and document existing and potential Centers of Influence (COIs), then analyze COI results and manage COI strategy
- Maximize feed list efforts
- Develop a future client list of suspects that you would like to be referred to

Promotion

- Manage digital presence:
 - Customize advisor's website on a regular basis to attract prospects and communicate the value proposition of the practice
 - Develop a strategy to drive traffic to the website and convert that traffic into connections
 - Leverage and maintain e-marketing through E-manager (Newsbrief, Ecards, Campaigns, etc.) to stay top of mind with existing clients and enhance client experience
 - Maximize social media presence to drive engagements by posting frequently and leveraging social media campaigns
- Position practice as thought leaders in the community by leveraging consumer education tools (whitepapers, explainer videos, seminars, etc.)
- Develop and maintain content/materials via the Marketing Portal
- Incorporate marketing pieces such as brochures, bylined articles, and preapproved articles
- Maintain email auto signatures

- Look for opportunities for local PR

Client Experience

- Build and deliver a comprehensive client touch plan and service plan to ensure client retention, additional purchases and drive referrals
- Create positive first impressions with clients and prospects by managing the office environment, client communication and ease of doing business
- Develop a marketing calendar that incorporates the right components and frequency to meet objectives
- Survey clients periodically to ensure their satisfaction and gain new insights for future planning
- Implement a client on-boarding process
- Plan and execute on opportunities for client appreciation and/or prospecting events
- Promote adoption of the client website

General

- Develop and execute on a marketing plan that includes review of the effectiveness of the efforts above, return on investments and tracking towards agreed upon measures of success
- Review marketing research reports and client list opportunities periodically
- Incorporate marketing as a standing topic in team meetings to report on progress, connect on key client/prospect information obtained and identify new opportunities
- Utilize home office resources such as marketing newsletters and webinars to keep abreast of what is available
- Manage compliance approvals of marketing materials

QUALIFICATIONS

- Superior interpersonal skills
- Ability to establish instant credibility with clients and prospects
- Strong attention to detail with the ability to work with a high degree of accuracy
- Superior written and oral communication skills
- Ability to maintain a high degree of confidentiality
- Ability to proactively identify what needs to be accomplished and take action as appropriate
- Ability to work both independently and on a team
- Familiarity with Microsoft applications and data entry and information retrieval software