



Quiz: Predict your 2018 marketing success

Take this quick assessment, created by advisor marketing expert Maribeth Kuzmeski, to predict your marketing success in 2018 and discover areas for potential improvement.

1. Do you have an up-to-date website with at least one call to action?

This call to action (CTA) may be to get people to interact, sign up for an email newsletter, request valuable information, download an article or whitepaper, or register for a seminar.

- 5 points for one or more CTAs
- 5 more points for each CTA that already generates qualified leads

YOUR SCORE: _____

2. Do you have a video on your website?

A video should be about one minute long and receive views every week.

- 5 points for one or more videos

YOUR SCORE: _____

3. Do you have marketing activity that generates at least five new qualified prospects each month?

Marketing activity might include seminars, events, mailings, email campaigns, networking, niche targeting, strategic alliance referrals, and client referrals.

- 5 points for each proven activity or strategy

YOUR SCORE: _____

4. Do you have a mailing list of more than 500 prospective leads?

- 5 points for every 500 prospects on your list

YOUR SCORE: _____

5. How often do you contact your list of prospective clients?

- 10 points if you contact prospects monthly via email, mail, or calls

YOUR SCORE: _____

6. How many prospects do you have on your “hotlist”?

These are the prospects you feel have a high likelihood of doing business with you this year.

- 1 point for each hot prospect

YOUR SCORE: _____

7. How many referrals did you receive in 2017?

- 1 point for every referral that became a client

YOUR SCORE: _____

Now total your points and see how you rate, using the score legend below.

How did you score? Predict your success:

YOUR TOTAL: _____

80-100+ points

Top producer. You'll likely have a great year!

50-79 points

Market up-and-comer. You're building a strong pipeline!

30-49 points

Just getting started. You're on the right track, but to acquire the new business you deserve you may need to pay more attention to your marketing.

0-29 points

Opportunity alert. You have all sorts of potential to use marketing better to generate prospects and new business.



Maribeth Kuzmeski, PhD, is the president of the consulting firm Red Zone Marketing. She and her firm personally consult with some of the nation's top financial professionals and advisors managing from \$300 million to over \$1 billion in client assets. She and her firm also work with entrepreneurial-minded corporations and salespeople on unique marketing messages, strategic marketing planning, recruiting, and business growth. Kuzmeski teaches at Columbia University School of Professional Studies, is a frequent speaker at international conferences, and contributes to major publications. She also hosts a podcast featuring inspiring businesswomen and is the author of seven books.

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