



SHERI FITTS: TOPICS, WORKSHOPS AND PRESENTATIONS

Sheri Fitts is a celebrated and widely recognized speaker, financial industry influencer, podcast host, author and founder of ShoeFitts Marketing. Her Portland, Oregon-based company is a consulting organization at heart, drawing on decades of experience in the financial services marketplace to identify, create and implement inspired marketing and social media strategies and solutions for its clients.

Sheri's podcast *Women Rocking Wall Street*, brings kick aspirational stories to women looking for mentorship and the courage to thrive in the male-dominated financial services industry. The podcast features motivational interviews with women in a variety of businesses and industries.

Her successful eBook *100 Tips for Social Media Success* offers tips and tricks for entering the digital conversation effectively, efficiently, and completely in compliance.

Voted a Top Influencer by 401kWire in 2013 and 2014, Fitts is also the recipient of awards and recognition from the Plan Sponsor Council of America, Pension and Investments; National Association of Government Defined Contribution Administrators; and the International Association of Business Communicators.

YOUR BRAND. YOUR BUSINESS. YOUR BOTTOM LINE.

Learn the secret code behind a passion-powered brand and how it can help you increase your bottom line and become more meaningful to your clients. Discover the intersection of brand and the "perceived" value of your services. You'll walk away with steps on how to create a unique brand and how to infuse brand into all your sales and service efforts.

Sheri teaches you to

- Discover the intersection of brand and the "perceived" value of your services
- Learn the secret code behind a passion-powered brand
- Generate deeper client relationships and new business through branding
- Walk away with steps on how to create a unique brand and how to infuse brand into all your sales and service efforts

ELEVATE YOUR PROFILE: SOCIAL MEDIA BRAND STRATEGIES TO GROW YOUR BUSINESS

Marketing has changed. The avenues that were part of a successful sales formula—public relations, advertising and tangible collateral—don't carry the same effectiveness today. Where did all the customers go? They're still here, but they went *online*.

Social media isn't some cyber lounge accommodating the college-dating scene. And playing the compliance card, as a reason to avoid social media engagement is no longer a viable excuse. It is time to get online. Social media creates favorable search engine optimization (SEO) for your business, it opens the door to innumerable new connections, and it is a crucial element in helping to build your brand. The online space provides a channel into the new buying cycle of your clients and prospects. Social media fortifies your brand, your business and your relationships.

Is social media part of your current marketing and branding strategy? Do you *have* a social media strategy?

Here's what you'll gain:

- Insight on choosing the social platforms that offer the best return of time invested
- Tips for navigating the regulatory minefield
- Efficient ways to curate content and manage technology
- One simple rule for online etiquette

READY, SET, SOCIAL

If you want to connect effectively with peers, clients and prospects today, you've got to get social. We'll go through the compliance considerations, prospecting strategies and brand work that shape a successful social media presence. You'll learn how to integrate social media into all of your marketing efforts and engage fully with the social sphere.

SOCIAL SELLING

The online world demands participation. And, active participation in online conversations can optimize effectiveness with peers, clients and prospects. The on-site workshop focuses on critical features of LinkedIn, as well as best practices for requesting new connections, avoiding content restrictions, and research and sourcing techniques for internal and field sales professionals. Attendees discover how to integrate social media into their day-to-day outreach efforts, truly engage within the social sphere, and help their advisor relationships optimize their efforts as well.

NETWORKING 2.0: BUILD CREDIBILITY, DEVELOP RELATIONSHIPS AND CREATE OPPORTUNITIES

The expanding use of technology, the Internet and social media has shifted the way many individuals approach business development, marketing and networking. Just as people may search the web for information about companies, business connections use the same tools to research vendors, products and services. While relationships trump technology when it comes to closing sales, savvy professionals are moving online to supplement their face-to-face efforts.

You learn about a variety of online marketing tools and resources:

- Why your digital footprint matters
- The real opportunity with LinkedIn, Twitter and Facebook
- Simple ways to create and curate content
- Practical ways you can use these tools to dovetail into your current outreach and networking efforts

You'll leave with action items, ideas and tangible resources to launch an effective Networking 2.0 game plan—one that will help build credibility, develop relationships and stay connected!

DECONSTRUCTING DIGITAL

In today's mobile world, a robust marketing program must embrace all facets of the digital conversation. This means you need a firm understanding of the inter-workings and best practices for all the digital elements and how the pieces fit together. Learn how you can effectively and efficiently promote, attract and engage with your clients in the digital space!

THE MATHEMATICS OF MARKETING

Some more analytical folks think that marketing requires a fair amount of creative flair. Flair often associated with the right-brained folks of our species. Flair that many business people may not have in their skill set. However, marketing—like many things, including music, engineering and graphic design—is mathematically based. It is a process of data, numbers and patterns.

This presentation discusses the mathematics of marketing and how to use them to kick start your firm's marketing process and multiply your opportunities.

As a result of the presentation and discussion, business leaders will

- Clarify the important role marketing and branding play in the sales process (particularly in today's multi-channel, digital world)
- Understand the intersection of courage, content, and contact
- Discover ways to develop a powerful -- and manageable -- marketing plan

SURVIVING THE OVERWIRED WORLD

Hundreds of emails every day, Facebook updates, LinkedIn invitations, cell phone messages: With all the incoming check-ins and chimes, how do you stay focused? Sheri provides you tools and coping mechanisms to successfully balance use of your demanding-yet-valuable technology and your need for peace in a distraction-free space. Thriving in the overwired world means focus.

During this session you'll learn

- Tips for managing your energy throughout the day
- Tools and ideas for building focus and eliminating distractions
- Efficient ways manage technology and emails
- Techniques for navigating the social sphere in a professional setting

IS ANYONE LISTENING?

Want in on a social media secret that's easy and can help your business? Listen. Yes, it's that simple: craft listening channels. Listen to industry thought leaders. Listen to your clients and prospects. And, listen to your competitors. Granted, social media is a great way to make and keep connections. However, many of those platforms can also be very educational.

With a couple of clicks on LinkedIn, you can find and follow the latest news affecting financial services and possible business implications. Hear something useful for your clients? Pass along the news and tell them why it's important. Similarly, craft listening channels to follow your clients, prospects and competitors. It's easy, and those channels let you track executive changes, company expansions and pertinent financial news.

With the *Is Anyone Listening?* Sheri lets you in on the secrets for crafting an affective listening channel.

USE STORYTELLING TO CREATE CONTENT

Creating your own social media content can seem overwhelming and downright scary. Were you a great math whiz in school but struggled with English? Don't worry, because right there with those math skills was probably the ability to tell a good story.

You're in a people-oriented business, right? So you must be good at relating to others, and basically, telling good stories. Use that gift to create your social media content. Sheri shows you how to take your people skills and create interesting and compelling social media content in this webinar.

STEP OUT OF THE SOCIAL MEDIA VORTEX

Tending to LinkedIn, Twitter, Facebook, Tumblr, Google+, Pinterest and more can feel like your spinning in a social media vortex. The oversight, participation and management of the various platforms can easily take hours out of your day.

However, before you decide to abandon social media altogether, rest assured there are ways to stop the spinning vortex. Solutions are easy and range from simple strategic planning tips to online management tools to old-fashioned productivity enhancements. Learn how to *Step Out of the Social Media Vortex*.

UNDERSTANDING THE GOOGLESHERE

Just how many times a day do you Google a business or product? Do you know what happens when you put out those search requests? More importantly, do you know how the Googlesphere world affects *your* business?

The latest calculation indicates there are 100 billion searches a month on Google! As a financial advisor you don't need to know all the ins and outs of the Internet, but you do need to understand how your website content and social media activity are intertwined to affect your SEO (search engine optimization) and your chances of being recognized on Google.

In *Understanding the Googlesphere* webinar, Sheri takes you through the important connections to help financial advisors piece together the Internet puzzle.

SOCIAL MEDIA IS NOT A SILVER BULLET

Social media sounds like an easy way to grow your business; post a few updates and you're good to go, right? Not quite. Social media is not a silver bullet. Social media is, however, an important aspect of a well-rounded marketing plan.

Just as you don't launch an ad campaign without first identifying your audience, content and goals, you don't roll out social media without applying similar criteria. Likewise, you must consider how social media plays into your overall marketing approach.

Make sure your social media plan, expectations and ROI are realistic and holistic with the *Social Media is Not a Silver Bullet* webinar.

YOUR VALUE PROPOSITION AND SOCIAL MEDIA VOICE

In today's competitive financial plan marketplace you must clearly define your value proposition. Clients and prospects want to know your expertise, why you are unique, how your solutions solve their most pressing problems, and why they should do business with you.

You must then articulate your value proposition with all forms of communication, including social media, and strive for a consistent and appropriate voice. While your value proposition outlines your vision and business solutions, your voice tells people how you help.

Learn how to identify and align your vision and communication style with the *Value Proposition and Social Media Voice* webinar.

CHANGING PARTICIPANT BEHAVIOR: A LOOK AT BEHAVIOR DESIGN

A 401(k) focused workshop

For nearly 15 years, the retirement plan arena has referred to the characteristics of behavioral finance to design effective retirement plans¹. These concepts include an understanding of the effects of inertia, fear of loss, procrastination and more.

The catchall solution created to address many of these behaviors was to create automated plans for everything: auto enrollment, auto increase and auto investment selection (QDIA). However, the auto-everything plan is not a panacea. Many employers hesitate to include the contribution increase portion of the plan design, creating a plan with many participants holding very small account balances.

As a result, the retirement plan world continues to be challenged by some participant behavior: How can we get people to sign up, save more, and make smart investment decisions? Developed by Stanford professor BJ Fogg, behavior design is a simple formula for developing technology and solutions that modify a specific behavior or series of behaviors.

Sheri explores the concepts behind behavior design and behavioral finance as well as their similarities and differences. Attendees learn

- The science behind small habits
- How to design an effective behavioral path
- Tips for more efficient brainstorming,
- How behavior design can change goal-setting methods in personal and professional settings

GETTING GENERATIONAL

Retirement plan participants range in age 16 to 60, but they all want to know one thing: how does your plan or service benefit them? Reaching these disparate groups — from texting twenty-somethings to button-down boomers nearing retirement — is tricky. Gain insight regarding how the various generations view their work, their families and their lives.

Understanding your own perspectives and biases as well as what motivates these individuals will be key to establish an engaging and effective communication framework that bridges and transcends generational differences.

¹ <http://www.anderson.ucla.edu/faculty/shlomo.benartzi/savemore.htm>