

MARKETING PLANS MADE EASY for the NOTARY ENTREPRENEUR



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2014 NNA Notary of the Year Honoree

NNA Notary Ambassador ®

Background

- ❖ Notary Public (2005)
- ❖ Signing Agent/Mobile Notary (2006)
- ❖ Process Server (2008)
- ❖ Notary Trainer/Instructor (2013)
- ❖ Private Investigator (2017)
- ❖ Insurance Agent (2018)



Objectives

- ❖ Understand the importance of a Marketing Plan.
- ❖ Introduce an easy 10-Step Planning Process.
- ❖ Give you some hands-on experience.

An Effective Marketing Plan...

- ❖ Identifies your target market and competition.
- ❖ Keeps you focused on your goals.
- ❖ Helps you offer the right services for the right price.
- ❖ Provides a **systematic** strategy that saves time & money.

What's the harm of NOT having a Marketing Plan?

“Unplanned marketing rarely, if ever, pays off. Without a plan, you risk making knee-jerk reactions to try to get ahead, and that can be very costly in the long run.”

-Marketing for Dummies, p. 103

Marketing Planning Process for Notary Entrepreneurs



Step 1: Brainstorm New Ideas / Services

- ❖ Mobile Notary - General Notary Work
- ❖ Apostille and Authentication Services
- ❖ Form I-9 Preparation
- ❖ Wedding Officiant
- ❖ Process Server
- ❖ Fingerprinting Services

BRAINSTORMING

- ❖ Wild ideas are okay.
- ❖ Make it a team effort.
- ❖ Write it all down.
- ❖ Don't rush the process.
- ❖ Don't try to problem solve...yet.



Step 2: Conduct *initial* Fact-Finding

- ❖ Google - Facebook - YouTube
- ❖ National Notary Association (NNA) Website
- ❖ Three A's: Authorized, Approved, Available
- ❖ Can ***YOU*** satisfy the eligibility requirements?
- ❖ What's the joy-factor; fun-quotient?

Step 3: Identify a Target Market

❖ Generations

- Gen Z; iGen
- Millennials
- Generation X
- Baby Boomers
- Traditionalists

❖ Customers

- College Student
- Newlyweds
- Immigrants
- Senior Citizens
- Licensed Professionals

Step 4: Select Marketing Strategies

❖ Traditional

- Conferences
- Cold Call
- Direct Mail
- Print Advertising

❖ Digital

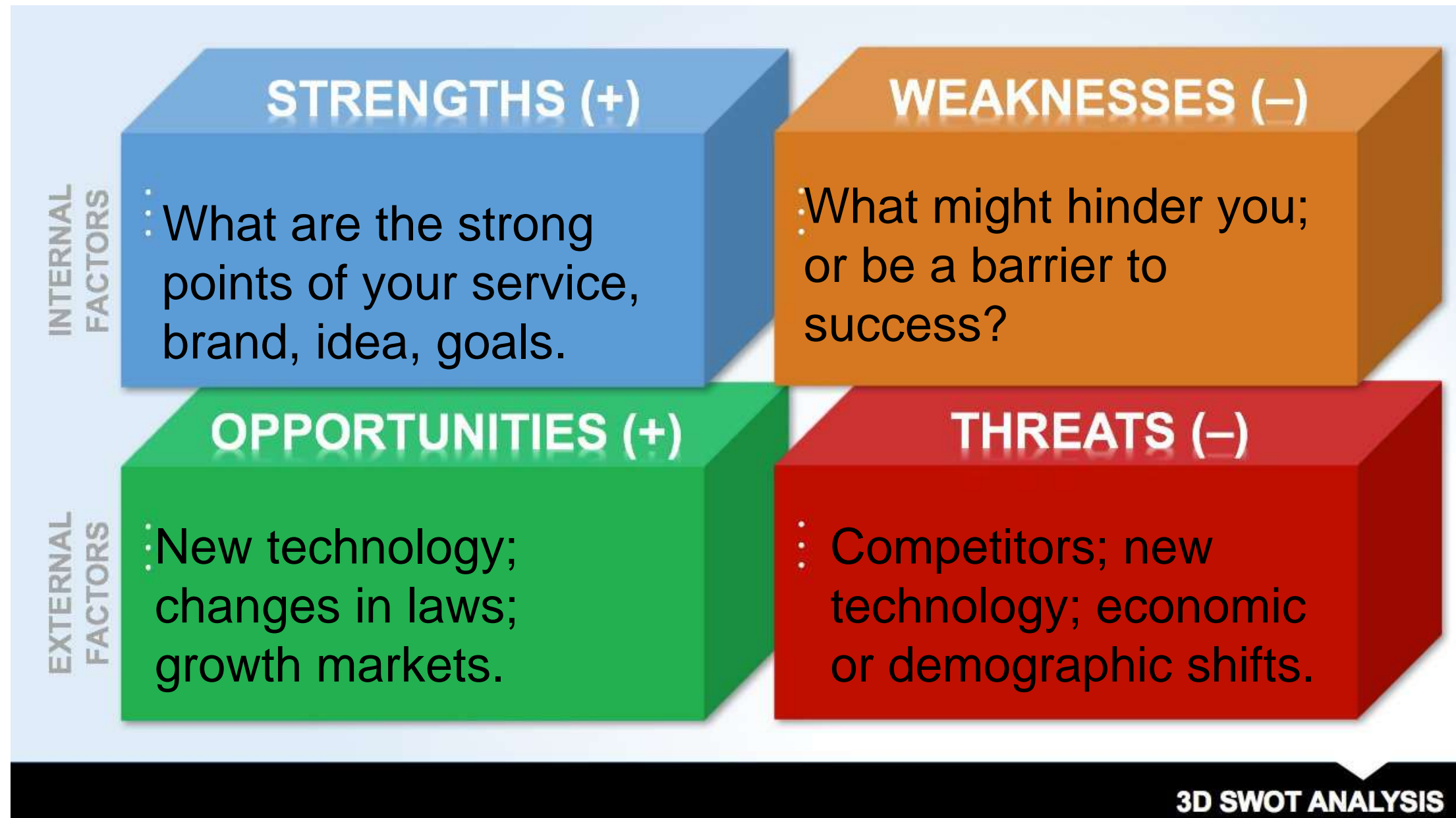
- Website
- Email Marketing
- Social Media
 - > Facebook
 - > Twitter
 - > Instagram
 - > YouTube

Step 5: Research and Development

- ❖ Competitive Data
- ❖ Licensing & Training
- ❖ Risk Exposure and Insurance Requirements
- ❖ Home-based vs. Brick-and-mortar
- ❖ Business Expenses
- ❖ Desired Profit Margin



Step 6: Conduct a SWOT Analysis



An Example

Certified Professional Cuddler

- ❖ Robin
- ❖ Platonic, Therapeutic
- ❖ Kansas and Missouri
- ❖ \$80 per hour
- ❖ Cuddlist.com



Step 7: Formulate a Working Plan

Step 8: Develop an Action Plan

- ❖ *To-Do List: task, objective/description, due date.*
- ❖ Write down outcomes and findings.
- ❖ Solicit input.
- ❖ Set *realistic* goals.

Step 9: Implement the Marketing Plan

- ❖ Expect *bumps in the road*.
- ❖ Celebrate milestones.
- ❖ Recognize Dead-Ends.
- ❖ Give it time to gain traction.
- ❖ Adjust efforts, as needed.



Step 10: Track and Monitor Results

- ❖ Complete an Activity Report
 - Weekly, Monthly
 - Phone Calls, Appointments
 - Website Traffic
 - Sales, Quotes
- ❖ Document
 - Journal
 - Blog
- ❖ Consult a mentor/coach

QUESTIONS



NOW, IT'S YOUR TURN!

- ❖ Group 1 - Fact-Finding
- ❖ Group 2 - Target Market and Customers
- ❖ Group 3 - Marketing Strategies
- ❖ Group 4 - SWOT Analysis

BRAIN
STORM!
CHALLENGE

SCENARIO GENERAL NOTARY WORK

- ❖ 10,000 Residents are eligible for **sales** tax refunds.
- ❖ Average refund is \$250 - \$700.
- ❖ Residents must submit a notarized claim form.
- ❖ Filing period June 1, 2019 - October 31, 2019.
- ❖ The claim form can be downloaded from the state treasurer's website.
- ❖ **Your Assignment: Develop a marketing plan.**



Conclusion

- ❖ Developing a Marketing Plan takes time.
- ❖ It's a must-have for every notary's business.
- ❖ 10-Step Process.
- ❖ Classroom Exercise
- ❖ It's up to you.

“I insist on a lot of time being spent, almost every day, to just sit and think. That is very uncommon in American business. I read and think. So I do more reading and thinking, and make less impulse decisions than most people in business.”

- Warren Buffet, Billionaire

www.suredividend.com/warren-buffett-quotes

Resources

“Notary Side Gigs: Non-Loan Marketing”

Brenda Stone, Blogger and Facebook Group Admin
College Station, Texas

www.notariesandnotarynews.com

“Marketing for Dummies”

Jeanette McMurtry, MBA with Alexander Hiam, 5th Ed.

Small Business Association

www.sba.gov

Questions?



Contact Information

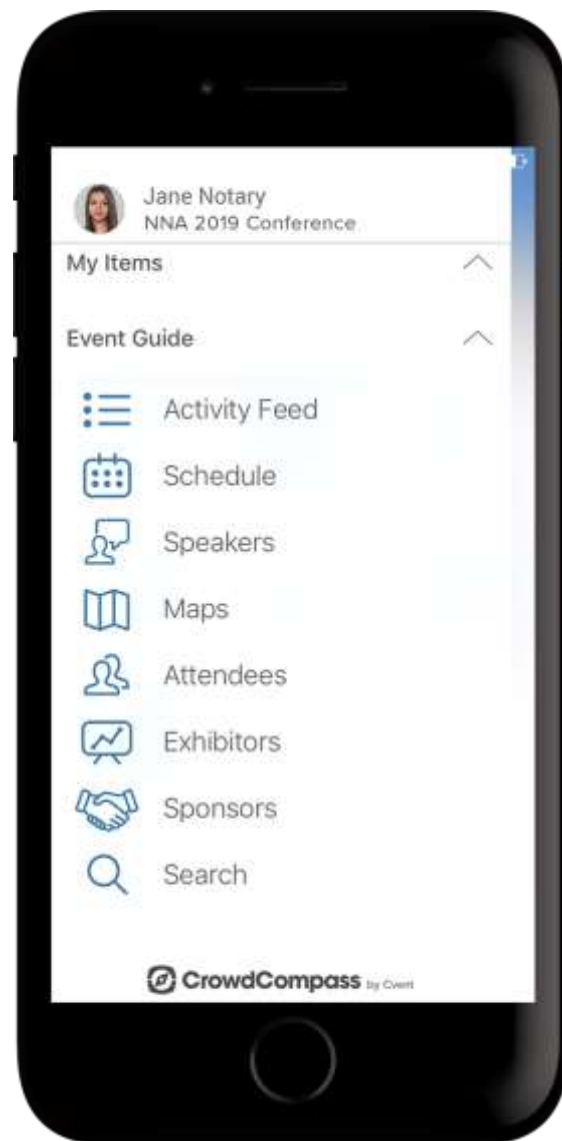
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