



WEEK 1

- We schedule the following meetings with you:
- Discovery
- Equipment Setup
- Podcast Coaching Call
- Introduction Podcast



- You register for the services
- You attend scheduled meetings
- You send us your company logo, headshot, and brand standards document



WEEK 2 & 3

- We complete Discovery Call
- We order equipment & help you set up
- We design podcast graphics
- We create podcast title/intro/outro scripting
- We have intro/outro recorded once it's approved by compliance



- You receive equipment
- You select music & voice-over artist
- You receive, review, and approve podcast title, description, and intro/outro scripts
- You send to compliance for their review and approval



WEEK 4

- We connect to record Podcast - Episode 1
- We produce & edit Episode 1
- We transcribe & review Episode 1
- We send the podcast, summary, and transcript to you for review and approval



- You meet with your podcast host to record Podcast - Episode 1
- You receive completed podcast, summary, and transcript for review and approval
- You send podcast documents to compliance for review and approval

WEEK 5 & 6

- We set up your podcast channel
- We publish Episode 1 & syndicate to popular podcast channels
- We connect with you to record - Episode 2
- We produce Episode 2
- We publish Episode 2 (once approved)



- You send approval of Episode 1 to Top Advisor Marketing
- You record Episode 2
- You receive podcast documents for review and approval (Episode 2)
- You send approval of Episode 2 to Top Advisor Marketing



You're on your way to being recognized as a Thought Leader.



EVERY MONTH

We schedule you for 2 podcast recordings per month.

- You prepare podcast outline and speaking points for each podcast
- You share outline with podcast host



EVERY MONTH

We connect to record Podcast(s)

- You meet with our podcast host
- You record podcast(s)



EVERY MONTH

We send you the produced podcast, summary document, and transcript for review and approval

- You review the podcast/summary
- You share podcast documents with compliance for review and approval
- You send approval to Top Advisor Marketing



EVERY MONTH

- We publish approved podcast(s)
- We syndicate to popular podcast channels
- We share with our media partner

- You share your podcasts on social media
- You share your podcasts in company newsletters
- You upload your podcasts to your website