

[00:00:00] Welcome to the perfectly integrated podcast, hosted by Matt Ackerman, where we show the power of teamwork in wealth management. Now onto the show.

[00:00:16] No, I've been looking forward to today's episode for a really long time, because I like to tell stories. And today I get to tell some stories and anyone who knows. Knows that I love that so much. Now this story today, it's a bit of a twofer and it's a story about a lack of preparation and abundance of preparation.

[00:00:32] And today's guest is the star of both those stories because she trusted me even when I faltered so that we can make it to a genius execution level together. And by the way, today's episode is all about exactly that it's all about execution because Kelly Waltrip is the financial industries queen of execution.

[00:00:49] And if I've learned anything from her in the. 20 years if I learn anything from my time in the 20 years in this industry and my decade of probably working with Kelly it's the ideas are great, but execution is everything.
[00:01:00] Okay. Back to the story. It's fall of 2016 and I'm in a holiday in salt lake city, Utah.

[00:01:06] We had come up with this incredible idea for new series called the secret life, where we would showcase advisers and their passions and having the right FinTech around. You really enables you to have the time to do amazing things outside the office. And our first advisor, we focus on agreed to have a crew on my film crew.

[00:01:23] And I come to his house boat on lake Powell with him and his extended family. While they flew on fly boards and went fishing and boating and all this stuff, my crew was ready. I was ready. I had planned this shooter. And Kelly calls. You see a week earlier, we had done another shoot together for her annual conference.

[00:01:42] And I had done so many conferences to this point that I was on autopilot. I figured I knew everything. And since I was so excited about the shoot in Utah, you know, I w I wasn't as precise or as planned as I usually am. Uh, I hadn't dotted all the I's crossed all the T's. We didn't chat [00:02:00] beforehand. We didn't finalize that.

[00:02:02] I was flying on autopilot and I thought everything was great, but it didn't hit the mark. So I'm in Utah and I'm ready to get an earful. I'm ready to

get fired. I'm ready for who knows. But Kelly calmly tells me not to worry. It tells me to focus on the task at hand and go execute perfectly on the next street.

[00:02:17] And we carefully reviewed everything we planned and that's Kelly Waltrip. That's her, she's this icon CMO in the industry. She's worked at Imani. She's worked at Orion and now. Launching her amazing business, intentionally doing amazing things. And you know, I've, I've gotten a chance to work on more projects.

[00:02:34] Here we are projects later, a few kids later, a few jobs later, I admire your skill and talent for taking an idea and turning it into magic through execution Kelly. Oh, thanks so much, man. Thanks for having me. And I will aim every day to live up to the introduction that you just gave me because I truly feel like I don't deserve it, but let's just take a moment and.

[00:02:58] Tell everybody a little bit about the [00:03:00] houseboat, because it's not every day in our industry that you get to go on a houseboat on lake Powell and strap a jet pack to your back for a marketing project. So I think, if there's any theme to this podcast episode, it's truly, like you said, around execution, but even more so than that, it's executing on.

[00:03:20] Things that are creative and smart and that are going to help you stand out. And so that's what I, Matt and I have done over the years is sort of think about what are those things, what is everybody else doing and how lame is that and how can we be, how can we be a step ahead? So it was wonderful friend that you agreed to go live on a houseboat with a bunch of strangers for those few days.

[00:03:41] And the footage that we got from that, if you're listening and you haven't seen it, you should get in touch with Matt because it is a very, very cool story that we. And the interesting thing to me is what you just said. It's just standing out. There we work in an industry where like status quo and like, I'm just gonna [00:04:00] repeat with the guy next door to me did, because that's enough or use the same fonts and colors and call it marketing.

[00:04:06] What, what always has amazed me is your ability to help people stand out in this industry. I mean, what, what does that take when you kind of start at the beginning with that to get folks to really stay. Yeah, I think, you know, we started intentionally my partner, Megan and I, and called it that for a reason, we're really intentional about everything that we do.

[00:04:26] And so when you think about a marketing agency in this space, you think about, you know, you need a piece of collateral or you need a, something designed, or you need a website built, but the way that we think about it and to answer your question is really what are your goals? What are the goals for your business and how do we then operationalize a plan to get to them rather than starting.

[00:04:46] The execution, um, and not going into a plan. So yeah. So you look at a hundred advisor websites and I am sorry. I know you're all out there listening, and this is going to hit hard for you, but if you have a sailboat or a time [00:05:00] piece, or, these generic images on your site representing who you are, you need to rethink it because it's true.

[00:05:07] What Matt said, that everybody has a hard time looking the same. And I think it comes from. Identifying who you are, what your business is, what your goals are, and then putting an intentional plan in place to get to those goals. And your, your brand is a big, big piece of that. It's got to have a hard though, because there you're working with people with big personalities that think in everything in marketing though, isn't sometimes within that skillset, you know, what are some of those big hurdles when working with some of these big personalities, how did, how do you do it with such confidence?

[00:05:42] That's a really good question. And I'll be honest with you. It's one that I ask myself every day. So if you think about it going from working in there, my CMO rolls any money in a Ryan. I was working for one CEO, one leadership team. And now as a consultant, I am working with 30 CEOs. And so [00:06:00] sort of.

[00:06:01] Maintaining the balance between listening and understanding exactly what their point of view is and what they want and exerting sort of the knowledge that you have from all of the experiences. So I just, I think that confidence comes from knowledge. If you're at the top of your game and you. Are consistently staying up to date with the best ways of doing things.

[00:06:24] If you're trying different things, if you're testing different things, if you have proof of, of what's worked and what hasn't, it's sort of, it's sort of hard to sort of hard to go against that. So I try to bring all of my big personality CEO's who have lots of ideas about how things should work, really precise information about.

[00:06:43] Why they should be doing what I think that they should be doing and what their results are going to be and what, you know, they can expect along the

way. And so I think, I think it's a matter of, you know, like I said, confidence really comes from knowledge, is staying at the top of your game in terms of everything that you need to know to be successful.

[00:06:59] And that's sort [00:07:00] of what I spend my days doing. I try to make it so I know. As much as there is to know about marketing and our space so that I can take that knowledge to those, those big personalities and, and, and help them understand how the tools and tactics that we deploy are gonna be going to help them.

[00:07:19] It's funny because on the media side, I had that confidence because it was always like, Hey, you don't like it. Someone else will all walk away. And you know, I always internally felt like, Hey, I'm going to show you, I'm going to show you. This can be a great idea. I'm going to show you this can be something that delivers for us.

[00:07:33] But it also, for me, that confidence was I had folks like you on the other side that I could always call and go, I've got this crazy idea. What do you think? And then the folks internally would leave me alone because. You were on my side. So that really made it easy for me, kind of growing up and doing this crazy.

[00:07:50] Right. And if you can hit the goals that you're aiming to hit. And I think that that's, that comes back to the question that you asked earlier. I think that if you can show results, you know, I'll use Eric [00:08:00] Clark. As an example, when I joined Orion, um, I was a one person team to start. And so by the end of my time there we were 35 plus team and an office open, but you better believe that he made me prove.

[00:08:13] The need and the ROI on every single one of those people and every single dollar that we spent. So I think it's a matter of, of choosing the things that are going to be the most impactful showing that you can get great results. And then continuing to add on that as you go, I think, you know, no CEO is going to turn down.

[00:08:34] Adding additional marketing dollars and additional spend in additional resources if you're showing results along the way. So I think it's sort of putting a plan in place that is going to be able to do that. I knew based on that, that lead generation needed to be the number one thing that we worked on at Orion, because as soon as I could show that, Hey, we could be providing opportunities to sales on a, on a pretty consistent basis and at a high clip that the resources and.

[00:08:58] The budget would, would flow from there. [00:09:00] And I can remember when you were a party of one and a Ryan, and I can remember going to those offices when you had your squad and your team, you were building there. What always stands out to me about those moments was the way you really empowered that team of people, the way you empower working with Meghan.

[00:09:15] Now these days, you know, how intentional does that have to be when you empower your team? I mean, nothing, I know nothing you do is by accident, but how important is it to have a team that you really impact. Yeah. I mean, this is no secret, but people are not. That I am not scalable. You're not scalable.

[00:09:36] And the only way to build something great is to, to empower people around you and to pass on the knowledge that you have. I think if you look in, in this industry or in your life and all the people that you work with, the ones that are most successful are the ones that are constantly. Sharing information, not the ones that are holding it close to the vest and trying to make sure that they're the only one that has it.

[00:09:57] It's those that are teaching the people around [00:10:00] them so that they can be better. And so that you can create a more scalable environment. Uh, and I, I think about that every day in my new business, it's a matter of. You know, I have lots of contacts into an, in the industry they're coming to us for marketing help.

[00:10:12] How do I make sure that the team around me understands why they're coming to us, what their expectations are and is able to give them, you know, the same sort of marketing effort that, that I would give them if I was their COO in house. So we spend a lot of time and, and Megan's awesome at that too.

[00:10:29] She's really phenomenal at, at working with team members, she was actually. You know, the person on my team that while I was working with Eric and the other leader, she was really the one coaching sort of our team to make sure that we were able to operationalize against everything we needed to help grow that business.

[00:10:47] Great leaders sometimes don't want to be great managers. They just want to be able to lead and have a vision. And I think what you do is you're able to really empower other folks so that you can focus on what you do best. And

that's, that's [00:11:00] amazing. Yeah, I, you know, it's funny, I've had so many conversations and it seems like a lot of.

[00:11:06] People are very similar to the relationship that Megan and I have, where they have someone in their life where one person is the dreamer and the big idea person. And the other person is the one that's executing. And that is me and Megan to a T. And I think that if you are listening to this and you don't have that in your life, and you're thinking to yourself, I have all these ideas and I don't know how to execute them, or maybe that I'm a ninja when it comes to.

[00:11:29] Making lists and execution, but I need the ID. You need to have that ying and yang, I think, to be super successful. And I'm very lucky to have found that in Megan. But I think that as you look around and, and even in your own life, it's interesting, it's seems that opposites do attract not just the people that you marry, but the people that you work with too.

[00:11:46] And so I'm very lucky every day. And I, I, I know. A lot of the success that we had at Orion and even the money come from relationships like that, where I know my strengths are to brainstorm and come up with [00:12:00] ideas all day long. And I need the people alongside me alongside me, who can say that's a good one and that one, not so much.

[00:12:09] I think you're the same way mad. So I think we have a lot of that in common. Oh, I'm a big dreamer. I come up with these crazy ideas and I'm lucky at integrated because Andre Moore is very good at being like that. Let's put that aside. That's a good idea. But we're going to save that for three months from now six months from now, because.

[00:12:28] Hey, if I got told by somebody along the way that I'm a fast starter, I'm somebody that gets really excited about an idea and get help it take off. And, and investment is Steve lamb. He had to execute all these crazy ideas that I would come up with and I would literally watch him just his shoulders fall and go, okay, deep breath.

[00:12:47] We're going to figure this out. Do you need this? You definitely do. You need those people in your life? It's funny because. I, you know, we talked a little bit about Orion, but you know, when, when we first met you already money [00:13:00] and I just watched. There was a conference where you were just, everything was, it was like you were spending a hundred plates, but it was like, you were the ringmaster and everything was going with, you know, no problem.

[00:13:12] You may have been a duck floating above water, fine cure kicking, like crazy underneath, but all anybody saw was how amazing you executed. What were some of the great lessons that you learned during your time at, uh, at, uh, uh, Yeah, I think, I think it comes back to the theme of this whole show. And it's your, it's the planning piece of it?

[00:13:31] Um, we very rarely, and to this day, any team that I'm overseeing or I'm a part of, I just, I don't do anything without a very. Thought out plan. Um, and so I know that there are lots of people out there that are really good at winging it, um, that are really good at showing up and dazzling. That is not how I think about things I want to walk in.

[00:13:53] I want to know second by second, what's going to happen. I want to have a plan B for every scenario. [00:14:00] Um, I want to be able to ask the answer the questions that haven't even been asked. And so my team, and I think that takes a little bit of extra effort and a little bit of extra time and a little bit of extra resources.

[00:14:11] But I think at the end of the day, the end result of that is always that you're game time ready. And that what you're delivering is just. You know, as good as it could possibly be. So we spend a lot of time putting plans together. And it's funny, we have a lot of clients who will come and we'll share this amazing, you know, 30 page plan in terms of what we're going to do and their eyes glaze over because all they want to know is how am I going to get new business in the door?

[00:14:38] And that's okay to us because it's our Bible for how we're going to execute at the end of the day to get that new business in the door. So I think, I think that's the answer. I mean, it's not glamorous man, and it's something that people are gonna say to themselves. That's her secret. That's, that's not, you know, that doesn't seem to be all that interesting, but it's true.

[00:14:57] Like, we are just so intentional [00:15:00] about every, every detail. That fake it till you make, it only gets you so far ever. I can remember the first conference I ever shot and I literally just kind of walked in, Hey, we're going to make, and I like got hit by all sides by mistakes along the way. And now, so then after that I was a spreadsheet guy.

[00:15:18] I was a carefully detailed list. It was because the execution is that. Right. And you think about, you think about all that goes into marketing. It's interesting. I, I, when I talk to business leaders all the time and I'm sort of coaching them through what their marketing organization needs to look like or

what their budget needs to look like, or, you know, it's really, one of the things that I tell them is when you have a sales organization, everybody in that sales organization is doing sales.

[00:15:44] When you have, um, a. You know, a product organization, they're all building products. When you have, you know, advisors, you're all advising clients at the end of the day, when you're in marketing, you're no one is doing the same thing. [00:16:00] Somebody's worrying about video. Somebody is worrying about digital.

[00:16:02] Somebody is worrying about creative. Somebody worrying about marketing strategy. Somebody worrying about social media, somebody is putting campaigns together. Somebody's worrying about HubSpot in the marketing automation. So it's a different beast in that. There are just so many things that have to go.

[00:16:16] For a campaign to go off so many details. And I think that for people who are not in it every day, you just don't, you don't know it until you have to click all the buttons and make the magic happen. So I think it's important to sort of understand all the components that need to, I think all the marketers out there that are listening are like, are thinking right now.

[00:16:37] Yes, thank goodness. She's saying that because it is, it's a lot of work and it's a lot of things that happen behind the scenes that, that most people don't realize. And people are thinking about marketing differently than they thought about it. Even five or 10 years ago. It's it's about quantitative metrics.

[00:16:53] It's about execution. Can't just be, look, we, we gave you this really shiny apple. If it doesn't get in the hands of the right people, [00:17:00] you feel. Right. And I think my big mantra at intentionally is, is that marketing is just as responsible for revenue as sales is. It's a true hand-in-hand partnership. And so what marketing used to look like, like you said, is completely flipped on its head and it's more of a revenue focused organization than it's ever been.

[00:17:19] I think COVID even accelerated that more so than, than prior to that, because everything is digital now. So everything is. More measurable. And so it's, I think drawing a line between the great marketers and the not so great marketers because you see into every success and every failure and every metric I used to cringe when I heard people say, well, what are your KPIs?

[00:17:43] Like, I would literally, for an idea, person scares the bejesus out of us. Right. Because we just wanted to be like, well, this was a great. How do we

get it's out there? Like, but you need, like you said, great. Executor's to take a great idea and make it into something otherwise, you know, what have you really accomplished?

[00:17:57] Yeah. So to that point, I will just say, [00:18:00] Matt, I am a believer that. 98% of things should be measurable. But I also, because I am like you, and I think that big ideas are valuable. I think that there are some things that you're going to do that are in measurable, but that are going to make a massive impact.

[00:18:19] So I, I definitely am in the camp of prove your, your value in marketing, make sure that you're marching towards revenue, but don't forget that. It's a space. It's one of the only spaces in business where you get to be really thoughtful and really creative and think outside the box and just, you know, try different things.

[00:18:38] So I think you can't lose that in the, in the March towards more metrics. Oh, yeah. My favorite people and you're on this list are people that would just go, okay, what do you have in that crazy brain of yours and mark? Bruno's another one where he called me a few weeks ago and said, okay, I've got a conference coming up, tell me what's in your crazy brain to do here.

[00:18:56] And that's what I love is anybody that [00:19:00] will unlock my crazy brain, but then not sit there and. Okay. Let's unlock all those KPI's scatter because that's not how my brain works, but I know that without those things, I don't get to do my next idea. So I think that's what I, people have to remember too. If you don't have executor's, you're not going to get to do the next one with them.

[00:19:17] Yep. You're so spot on. It's it's gotta be a really good balance. And I think, you know, my team. I I told Megan yesterday that my goal is in the shower every morning. I'm going to come up with an off the wall, crazy fun idea for one of our clients. And it's not going to come in any rhyme or reason. It's just going to be who's top of mine that morning, and we're going to go give something to try and we're going to just, you know, do fun things.

[00:19:42] Um, and I'm sure I, we weren't on camera at the time, so I'm sure she was, you know, making faces at me as I was telling her this. But I think to your point, it's so important to. Like the mark Bruno's of the world and others were trying to push the brown boundaries to take the time, to, [00:20:00] to think about those creative things, because it's so easy to just get into a routine of here's what we do.

[00:20:06] We do it over and over again, it works, but is it really, is it really differentiating you? So, yeah. I found when he stopped being creative was when I really always knew. Okay. It's time to try something else. And it's because I, you need to be moving that ball forward creatively. Otherwise you're going to find yourself five years down the road with.

[00:20:32] Where people aren't going to consider you innovative anymore. And that's important in this industry, it could be considered a different, a differentiator and innovator. I think that's important. Yeah, I think so too. I think that in marketing, it's an interesting time because it's everybody COVID moved everybody to digital.

[00:20:49] So it's almost like I am at on the edge of my seat, reading things, brainstorming things, trying to figure out like what is going to be the next. The next thing, the next [00:21:00] podcast, the next digital, what is going to be the next wave of innovation in marketing that everybody gets excited about? Because I want to be there first and I want my clients to do it first.

[00:21:10] And so I am going to make sure that that's the case. So when there's new opportunities to capitalize on marketing tactics and growth ideas, uh, I, you know, I always want to be sort of driving the boat and not chasing. And we talked a little bit about intentionally where I really think you're driving a new boat here.

[00:21:30] That's trying something totally different, but I want to make sure the audience understands the amazing stuff you're doing. Tell us a little bit intentionally. Yeah. So intentionally I, um, the pandemic hit, I asked myself if I loved what I was doing and don't get me wrong. I love Eric Clark. Um, love Orion.

[00:21:46] The team over there is family to me, and they're going to continue to crush like they have been for years and years and years, but I sorta took a look around and I thought this industry needs an agency that they can rely on. That is both modern in their [00:22:00] marketing thinking. But also that understands the nuances of financial services.

[00:22:04] This is a complex business. And so trying to pull in marketers and agencies from other. You know, from outside of our space, it's really, you spend a lot of time translating before you even get to, to execution. So I feel like this industry needed a team of people that they could rely on to be both great modern marketers and understand the space, but it didn't.

[00:22:26] In addition to that, I wanted to be a team of people that would operationalize against a goal. So when you think about agency relationships, you usually go to them and you say, Hey, I need this white paper. I need this press release. I need this website, but for us it's Hey, I'm trying to drive. 10 new recruits to my business this year helped me put a plan together to get there.

[00:22:48] And then we want to be accountable to that, to that plan and that goal to make sure that we're doing everything we can to get that business to it. So I, you know, I call us a marketing agency, I would say [00:23:00] it's more so growth design, what are your growth goals and how can we be your partner in making sure that you get to them?

[00:23:06] So I'm having a ball. I have a phenomenal team. I am happier than I've been in a really long time. I'm loving it. And, you know, integrated is one of our clients that we love working with, which is how you and I got connected again, which is awesome. Um, but we work with a lot of FinTech clients, advisory firms, asset managers.

[00:23:27] You name it, but the one key thing that is consistent across all of those firms is that they're not just coming to us and saying, Hey, I need a direct mail piece or, Hey, I need to launch a podcast or, Hey, I need a piece of collateral. They're saying, Hey, I've got big goals and I need strong partners alongside me to, to reach them.

[00:23:46] And so that's what we're, we're trying to be for these. Yeah, it comes down to, um, execution's great. Requires a plan, but it also, you have to think strategically if you're just, you know, [00:24:00] checking a box, those are not usually people that you come back to to be partners. Long-term and that's, what's been impressive about working with intentionally so far has been.

[00:24:08] It feels like you're part of the team and that's, that's, that's an amazing feeling where you can go, Hey, I know this, isn't something that's specific for this, but I have a question about that and you're always guys willing to jump in and that's incredible for both of you and Megan as teammates. Yeah.

[00:24:22] It's been really great to work with you guys. And I think the sky's the limit in terms of what we're going to be able to do together. We have a, we have a good thing going for sure. So it'll be interesting to see what happens moving forward. Yeah. Well, on this podcast, my last question is always from my ten-year-old son, CJ.

[00:24:39] I got to tell them some great, crazy stories. Um, some of them suitable for air, some of them about, um, uh, how I had to do some. By some unlubricated condoms in order to waterproof microphones. So, uh, did you ever hear that story? I told you that story for that shooting in Utah, I literally to waterproof the microphones, had to buy unlubricated [00:25:00] condoms and these expense report went back to mark Bruno and he and Suzanne and HR had a conversation where they were going to come back to me to find out why I had expensed on lubricated condoms.

[00:25:10] It is one of my. I like to imagine mark Bruno, having to think about having that conversation with Suzanne Syracuse and then, gosh, I'm talking to him on Tuesday. So I'm definitely going to remind him of that. Please do. Anyway. I did tell CJ that story, which is funny because then he had to ask what condoms were.

[00:25:27] So I'm parenting. Well, I guess anyway, my last question I told him about some of our projects, uh, and how much fun is that? His question was what's the best and worst thing about working with my dad. Oh, That is, I feel like the best thing is that there is nothing too wild to propose to you. Uh, and I feel like there aren't that many people out there like that.

[00:25:53] I think you and I jive in that way that we've, you know, we're not willing to step outside the box. And of course we [00:26:00] reign each other back in which needs to happen sometimes. But I think that that's, um, the greatest thing about you, Matt, for sure. And then.

[00:26:12] I don't know. I feel like, you know, it's interesting. I feel like I am lucky because you're back at integrated before we were work or you're at integrated before we were working with you. I was bombed because, you know, I think you bring such a good voice to the industry. So I, I, that would be my thing. I think that you need to make sure that you're still, you're still out there and you're still bringing a voice to the industry.

[00:26:38] Um, with integrated as the backdrop, I'm trying, I'm trying, we're doing some new stuff with a couple of publications. I can't get the media out of my blood. It's never going to happen. I know you can't get that out of there, but Kelly, this has been awesome. It's so great. Chatting with you. Thanks for making some time to join us today on perfectly.

[00:26:54] Yeah. Thanks so much. And I hope that we can get you back out on a houseboat soon or let's go or something [00:27:00] crazier, right? I'm sure we can come up with something crazy here. Thank you, my friend. And thank you

all for joining us today. And another great episode of perfectly integrated for integrated partners.

[00:27:09] Uh, Matt Ackerman have a great day.

Content in this material is for general information only and not intended to provide specific advice or recommendations for any individual. All performance referenced is historical and is no guarantee of future results.

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Integrated Partners, a registered investment advisor and separate entity from LPL Financial.

Kelly Waltrich is the co-founder of Intention.ly and is a separate entity and not affiliated with Integrated Partners or LPL Financial.