

THE **MARKETING MIX**

March 2023

2

Seasonal themes
& topics to help

**AMPLIFY YOUR
MARKETING
RESULTS**



Look inside for more tips!

Cold to Gold Framework

Social Media Prompt

Client Event Ideas

and more!

FEATURED THIS MONTH

Struggling with choosing informative and timely communications? Here's one super easy approach that will help: Seasonal topics and themes. Check out these suggestions:



Preparing for Tax Season



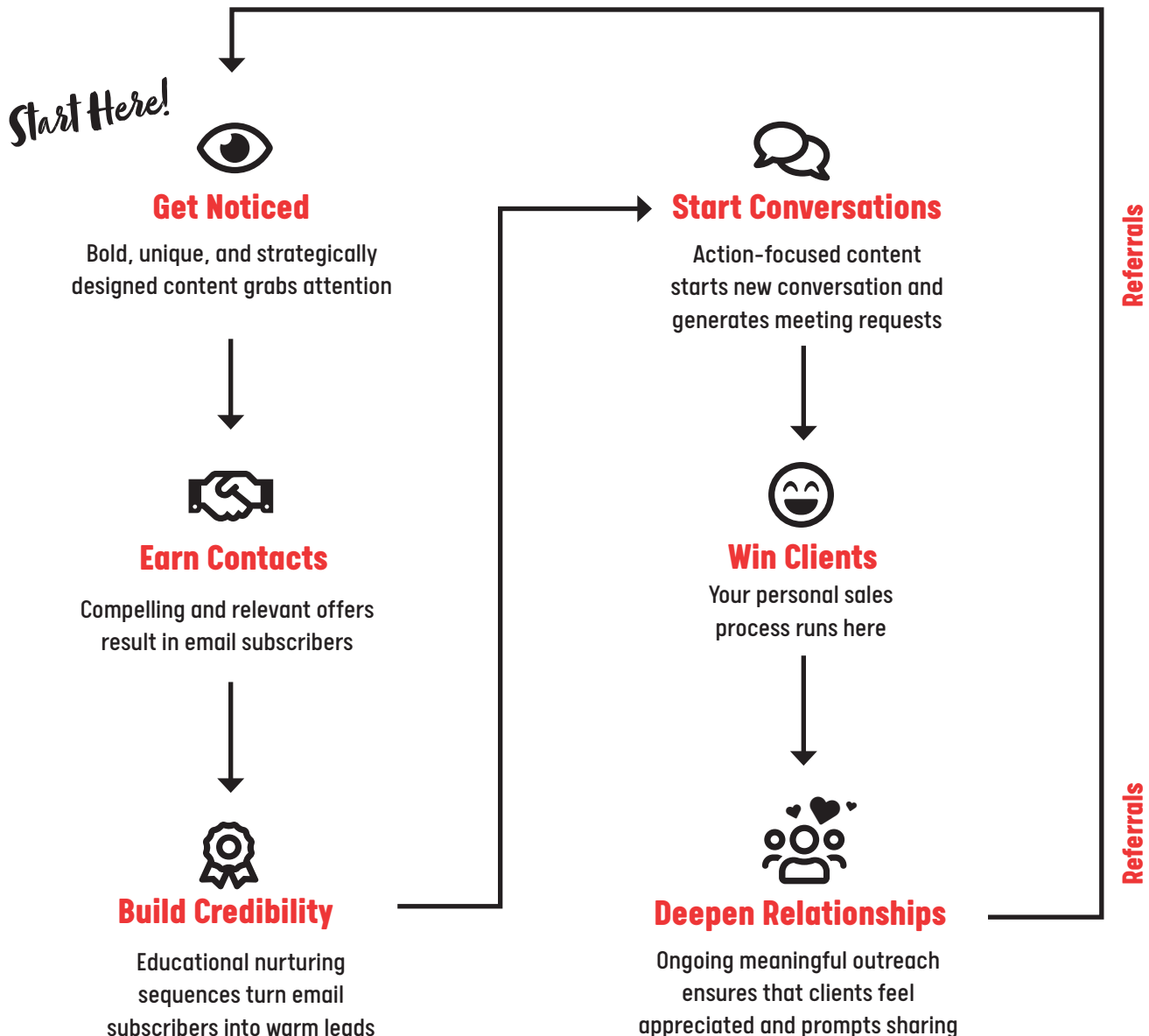
National Women's History Month

Achieve better results with a **COMPLETE STRATEGY** *The Cold to Gold framework*

The **Cold to Gold Framework** is our proven strategy to help you take your prospects and turn them into clients.

The campaigns in this Marketing Mix fit into various positions within the framework to help you create a robust marketing experience for your clients and prospects.

Match up the icons below to the campaigns within the mix!



5 CAMPAIGNS

to *jumpstart* the month

With such robust content to sift through every month, we'd like to give you our top picks. You can launch these on your own or with us in a Launch It! Session.

COLD TO GOLD

Just a little reminder ;)



Get Noticed



Earn Contacts



Build Credibility



Start Conversations



Win Clients



Deepen Relationships



Women's Money Myths
Lead Generation Campaign



Money Wisdom
Visual Insights Newsletter



Tax Planning
Prospect Engagement Campaign



Behavioral Biases
Personal Connection Video



Tax Questions
CONVOS



Be a reassuring presence for **RECESSION MARKETING**

Your Recession Anxiety Playbook

A recession is probable in 2023 and investor anxiety is high. **Our research shows** that HNW investors are more likely to both leave their current advisor or find a new advisor during these times. That means now is a critical time for advisors to ramp up communication to retain clients and convert new prospects. **Our recession-oriented emails and campaigns are designed to help you be reassuring and ever-present to your clients and prospects.**



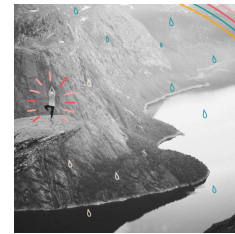
Inflation True/False Quiz
Visual Insights Newsletter



Burnout & Willpower Gap
Visual Insight Newsletter



How to Weather a Recession
Visual Insights Newsletter



Silver Linings of Uncertainty
Visual Insights Newsletter



Retirement Income Teeter-Totter
Lead Generation Campaign



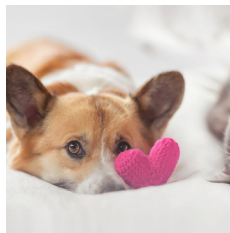
Recession Investing
Lead Generation Campaign



Investor Recovery*
Lead Generation Campaign



Retire Confidently in a Crash
Lead Generation Campaign



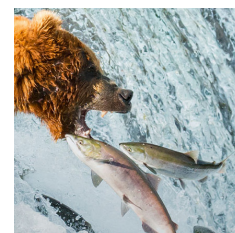
It's Going to Be OK
Timely Email



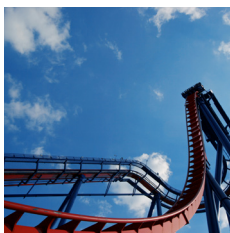
Make Room for Hope
Timely Email



Recession Investing
Prospect Engagement



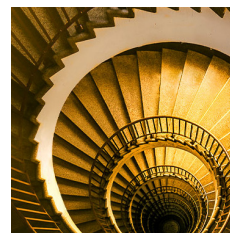
Bear Market Perspective
Personal Connection Video



The End of the World
Personal Connection Video



The Power in Uncertainty
Personal Connection Video



Recession Worries?
Personal Connection Video

STAY TOP OF MIND

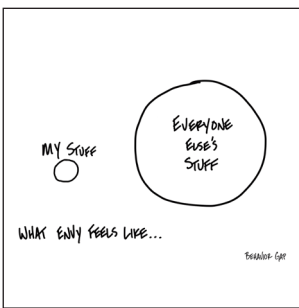
Building a base of loyal clients is one of the most important yet challenging things you can do to grow your business.

Client Focused Campaigns

Communicating with your clients regularly is one of the best ways to stay top of mind, reinforce the value you bring, and drive client loyalty.

Check out our recommendations for client content that will help deepen those relationships.

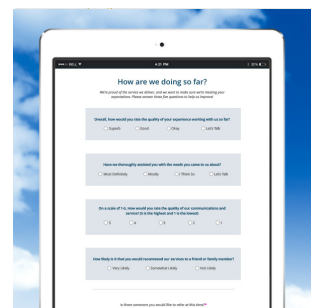
Campaign Suggestions:



Behavior Gap by Carl Richards
(Add On)



VIN: Retirement in 2050
Visual Insights Newsletter



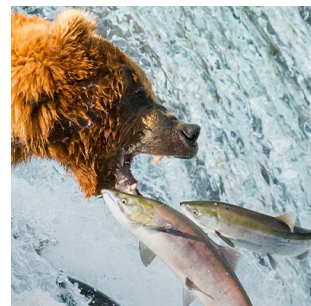
90-day New Client Onboarding
Client Communications



VIN: Inflation True or False Quiz
Visual Insights Newsletter



Avoiding Scams Single Topic Email
Single Topic Email



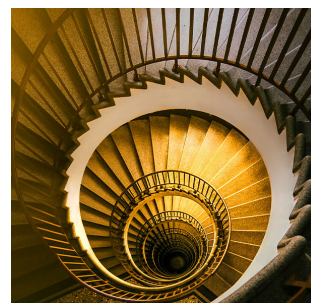
PCV: Bear Market Perspectives
Personal Connection Video



My Why
Personal Connection Video



Small Wins
Timely Email

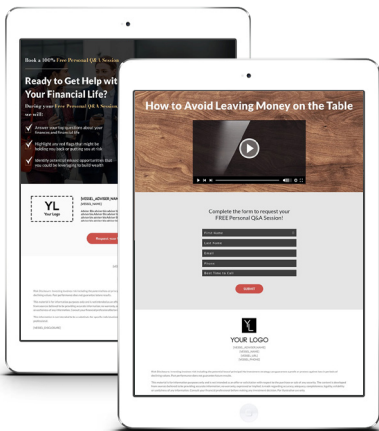


PCV: Recession Worries?
Personal Connection Video

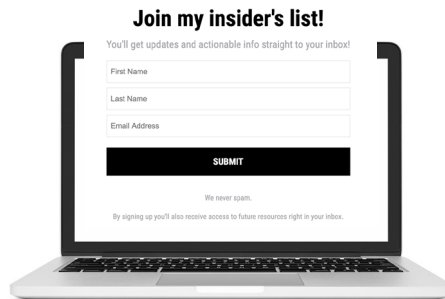
Let's start with the ESSENTIALS

Set yourself up for success by making sure you've launched these campaigns. Consider these campaigns your bread and butter when it comes to your marketing.

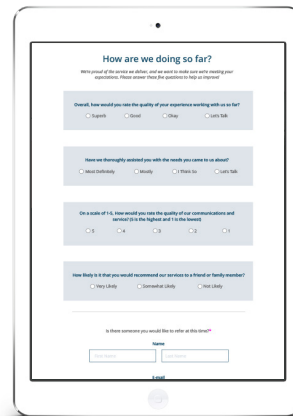
8-Week Prospect Nurturing Campaign *(with or without video)*



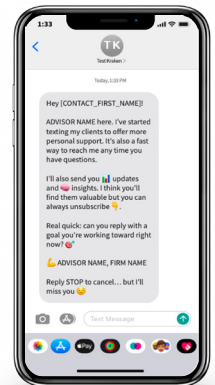
Website Opt In Form



90-day New Client Onboarding

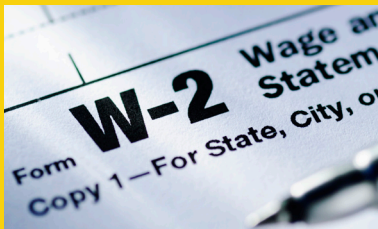


CONVOS: First Time Texting Intro



Coming Soon!

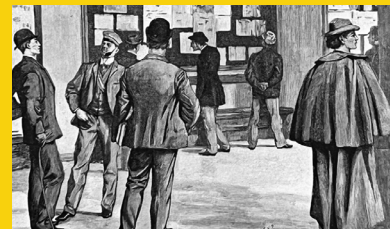
You won't want to miss these dropping next month.



Tax Literacy Quiz
Visual Insights Newsletter



Investor Recovery
Lead Generation Campaign



Q1 2023 Financial Update
Financial Update

GET SOCIAL!

Marketing doesn't start and end with automation. Personal posts are still critical to building those connections.

To do: **Fill in the blanks to help you get started with a social media post.** Post alongside a picture of your office, a selfie of you in your favorite spot, or an image that invokes inspiration (think sunset, beach, etc.)

Social Media Prompt of the Month:

Post on Employee Appreciation Day - March 3rd

OPTION 1: Shout out your employees!

Few things or people are truly "self-made". Behind most successes are a team committed to a common cause. I'm so grateful for how my team has come together to [ACHIEVEMENT] in [TIMEFRAME]. Like so many things in life, I couldn't serve my clients, build my community, and move forward with my personal and professional goals alone.

OPTION 2: Give your clients an opportunity to shout out their employees!

Few things or people are truly "self-made". Behind most successes are a team committed to a common cause. Like so many things in life, it's difficult to serve clients, build your community, or move toward personal and professional goals alone. How has your team come together recently? What have you achieved together?



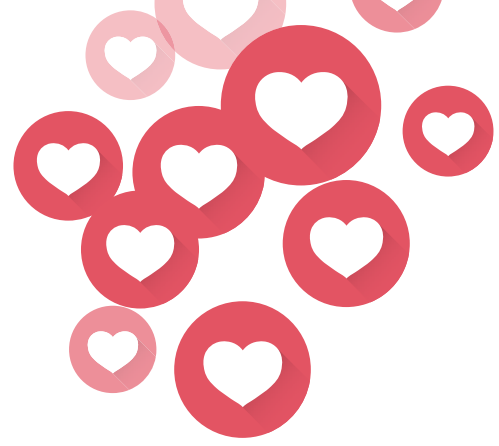
Post on International Women's Day - March 8th

On International Women's Day, we celebrate the achievements of the women in our lives and our shared history. Today we have the opportunity to focus on issues where women activists, leaders, and entrepreneurs have led the way – like gender equality. I'm continually inspired by [SIGNIFICANT WOMAN] for her [TRAIT OR ACHIEVEMENT]. Who do you honor in your own life and community today? Which women from history inspire you?

*Level up! Launch a campaign tailored specifically to women and use this social media post as a kickoff. Position yourself as an expert in the questions and challenges some women face around finances – check out the "Women" audience category in the library to get started.

GET SOCIAL!

cont.



Post on International Day of Happiness - March 20th

What makes you happy? I mean those things guaranteed to make you smile, laugh out loud, or feel better when you're down? For me, it's [THING THAT MAKES YOU HAPPY]. I've found that intentionally bringing more [THING THAT MAKES YOU HAPPY] into my life changes how I feel, how I look at the future, and how I interact with those around me. It's International Day of Happiness and I want to know: What's bringing you happiness today?

*Level up! Launch a complimentary campaign and use this social media post as a kickoff. Check out library categories like Lifestyle/Enrichment, Mindset, and Philanthropy to find the perfect campaign to keep your clients and prospects thinking about improving happiness in every aspect of their lives.



Post Pairings

Find an accompanying stock image or personal photo to go along with these social post ideas! Want to level-up? Drop a video and send a personal message instead.

- World Compliment Day - Mar 1
- Caregiver Appreciation Day - Mar 3
- Purim - Mar 6
- National Pi Day - Mar 14
- Saint Patrick's Day - Mar 17
- National Puppy Day - Mar 23
- Live Long and Prosper Day - Mar 26

GATHER 'ROUND

Check out these ideas and use our **Event Planning Checklist** in the library to help plan your next event.



March Madness Party + Bracket for Charity

The NCAA men's basketball tournament starts on March 14th. Find a local bar & grill to host your game watching party and have your clients bring a plus one. Prior to the event, set up a tournament bracket to raise money for a local charity!

Cooking Classes

These are always a hit! Private cooking classes range from around \$70-100 per person but can be well worth it for your top clients. Cap the invitees to ten people for a more intimate setting. Maybe you're a chef yourself and you can run the cooking class and teach your class how to cook your favorite meal! Choose between themes like handmade pasta, knife skills, seafood, Italian, Spanish tapas, and French cuisine.

One financial advisor shared how he did a sushi rolling class which is pretty unique! But, a sushi rolling class has a long, mental shelf life. Whenever your clients go out for sushi, they will likely remember how they took your class. They'll talk about it with whomever is at the table and explain how they made different types of rolls. From there, the conversation could lead to a referral for you.



MARCH MARKETING CALENDAR

Monday

Tuesday

Wednesday

Thursday

Friday

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