

THE MARKETING MIX

August 2024

3

Seasonal themes
& topics to help

**AMPLIFY YOUR
MARKETING
RESULTS**

Look inside for more tips!

Cold to Gold Framework | Social Media Prompt | Suggested calendar | 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:



Black Business Month



What Will Be Your Legacy Month



Back to School Month

Achieve better results with a

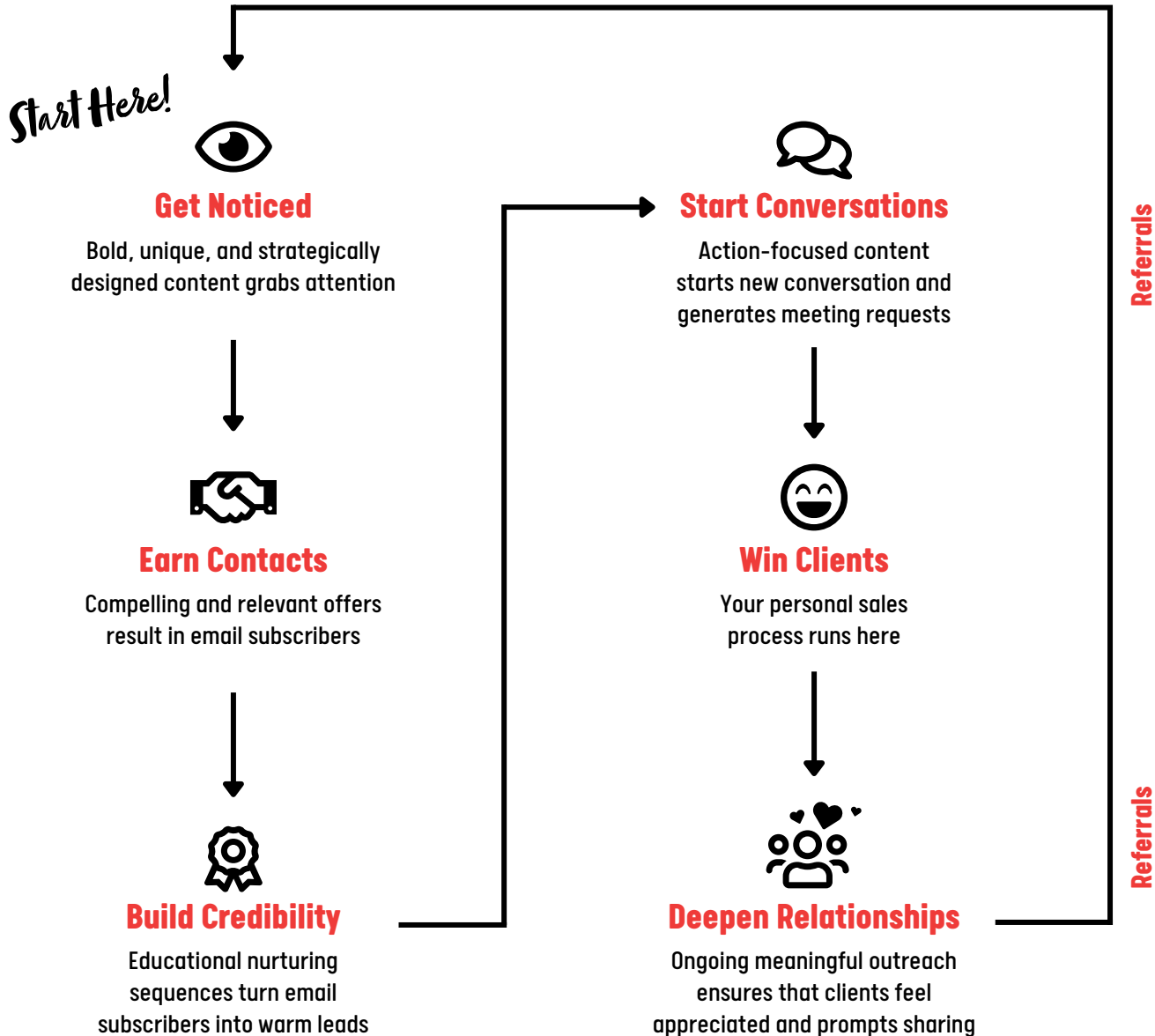
COMPLETE STRATEGY

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 Marketing Mix: Launch It! Session.

COLD TO GOLD

Just a little reminder :)



Get Noticed



Earn Contacts



Build Credibility



Start Conversations



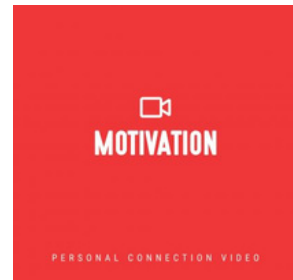
Win Clients



Deepen Relationships



Millennial/Gen Z Money Moves
Lead Generation Campaign



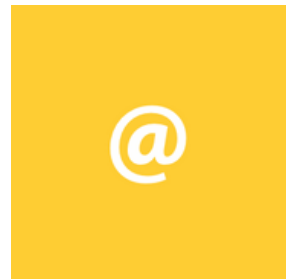
Motivation
Personal Connection Video



The Role of a Power of Attorney
Single Email



Estate Planning Mistakes & How to Avoid Them
Visual Insights Newsletter

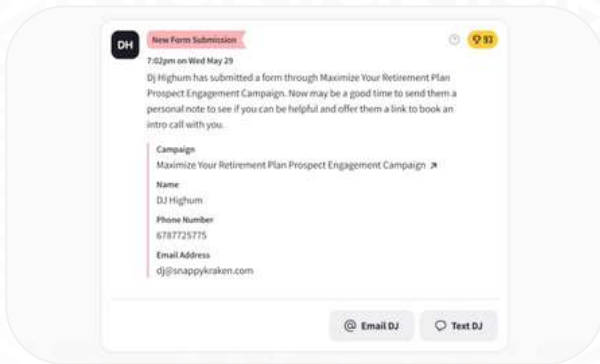
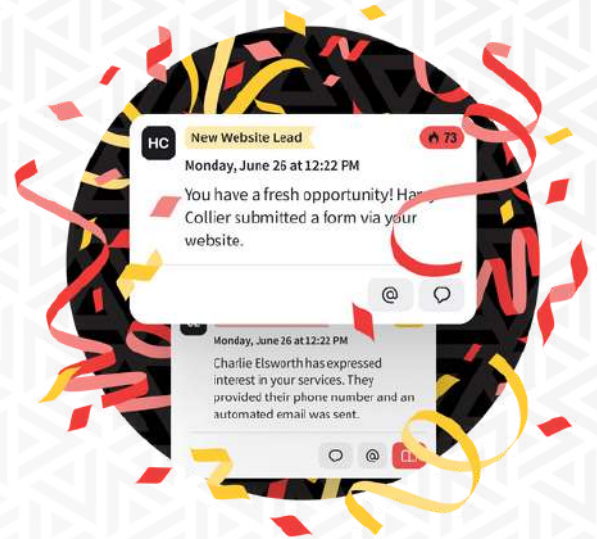


Timely Emails
Launch as soon as possible



Introducing the MARKETING HUB

Our brand new tool that surfaces your biggest opportunities and makes it simple to deploy the right message, to the right person, at the right time.

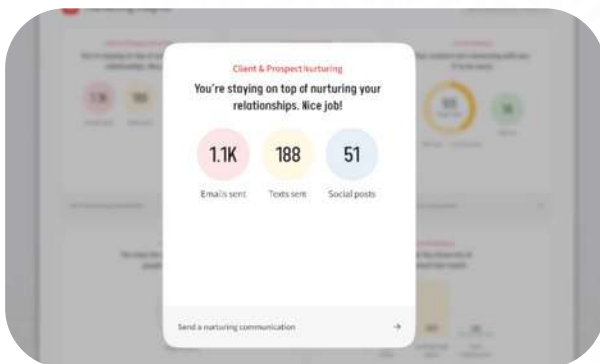
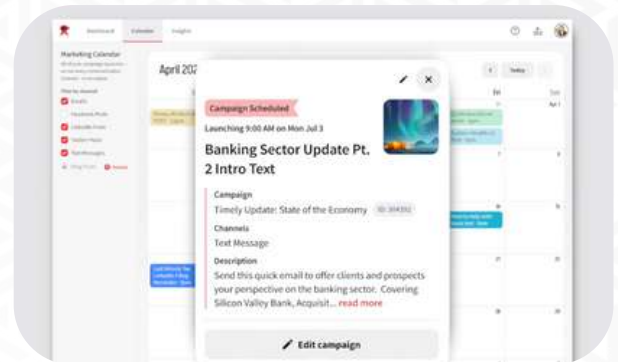


See activity & opportunities clearly

See real-time engagement and recommended actions based on campaign performance and contact activity.

New interactive calendar

Track your marketing activities across multiple channels. Experience a clear view of what's been published and scheduled.



Marketing channels that perform together

The "Insights" section shows how fast you're growing across all your channels. No guesswork. Just know.

Out Now!*

Log in at auth.snappykraken.app to access the Marketing Hub, or look out for this icon  at the top-right corner of any Snappy Kraken platform! **Try Now!***

*Marketing Hub availability on enterprise platforms is dependent on enterprise approval.

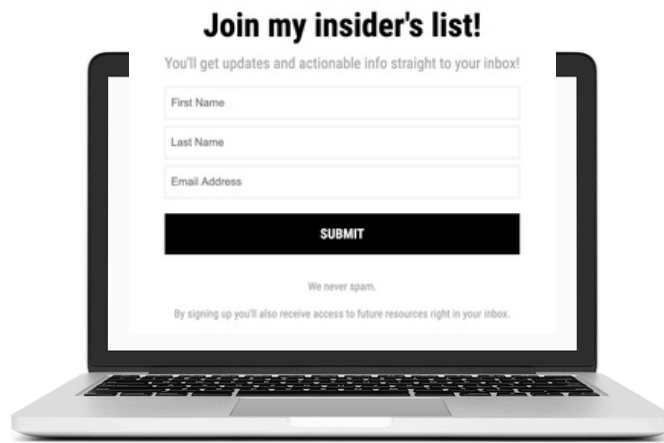
Let's start with the ESSENTIALS

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.

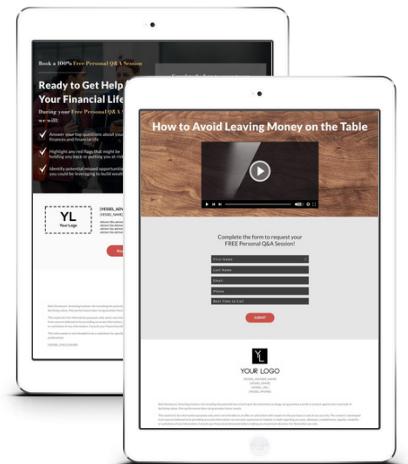
90-day New Client Onboarding



Website Opt-in Form

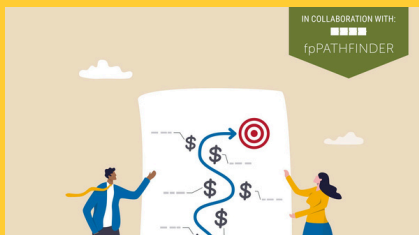


8-Week Prospect Nurturing Campaign (with or without video)



Coming Soon!

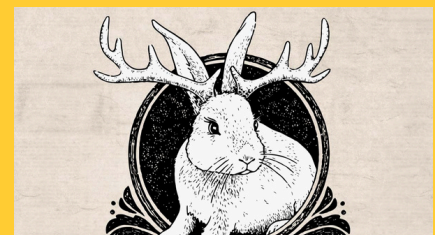
You won't want to miss these upcoming campaigns.



Annual Client Review
Single Email



Not All Advisors Are CFP®s
Personal Connection Video



Debunking Investment Myths: What Doesn't Drive Returns
Visual Insights Newsletter

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:

National Financial Awareness Day - August 14

Happy National Financial Awareness Day! Today serves as an important reminder to take proactive steps toward your financial future. Whether it's saving for a down payment on a house, building an emergency fund, or planning for retirement, having well-defined goals is crucial to success. However, many individuals and families do not know how to achieve these goals after defining them. This is where I can help. Call our office now at [OFFICE NUMBER] to book a free consultation today!



Post this on Women's Equality Day - August 26

Women's Equality Day commemorates the adoption of the Nineteenth Amendment in 1920, which granted women the right to vote. This historic victory was a crucial step in the fight for gender equality. As we honor this day, let's also strive for financial literacy and independence for all women, ensuring they have the knowledge and resources to make informed financial decisions.



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.

- Child Support Awareness Month
- World Lung Cancer Day - August 1
- Cycle to Work Day - August 1
- International Cat Day - August 8
- Book Lover's Day - August 9
- National Financial Awareness Day - August 14
- National Senior Citizens Day - August 21
- National Waffle Day - August 24
- Women's Equality Day - August 26
- National Dog Day - August 26

AUGUST MARKETING CALENDAR

See when each of your emails + social posts are scheduled on your Marketing Hub Calendar!*

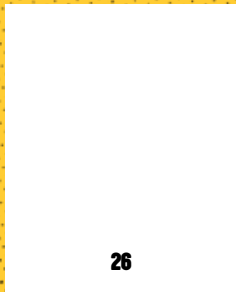
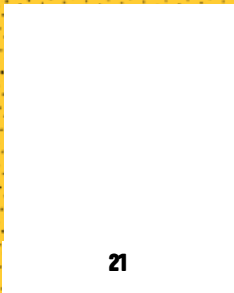
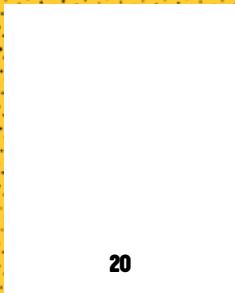
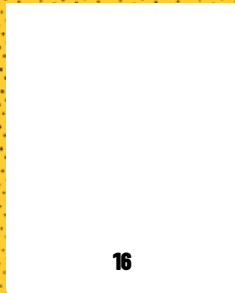
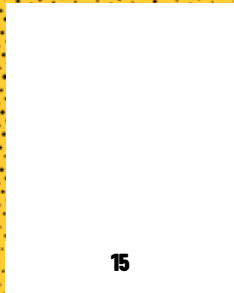
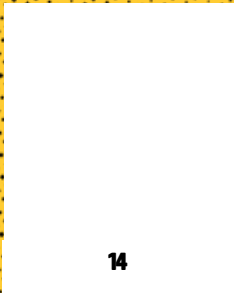
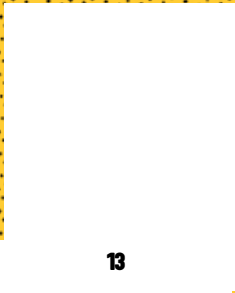
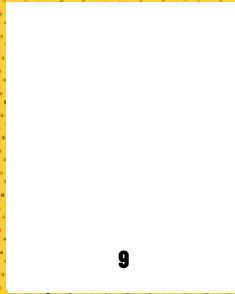
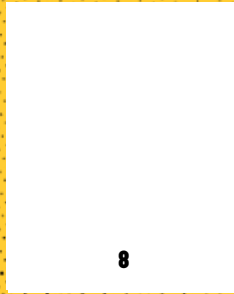
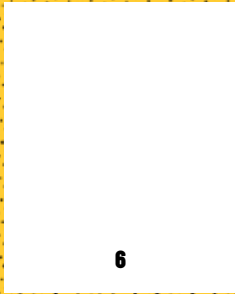
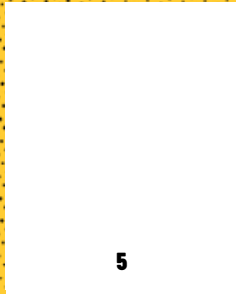
Monday

Tuesday

Wednesday

Thursday

Friday



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