

THE **MARKETING MIX**

July 2024

2

Seasonal themes
& topics to help

**AMPLIFY YOUR
MARKETING
RESULTS**

PLUS

**OUR NEWEST
MARKETING
INTELLIGENCE
TOOL - THE
MARKETING
HUB!**

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:



Summer Celebrations



Retirement Planning

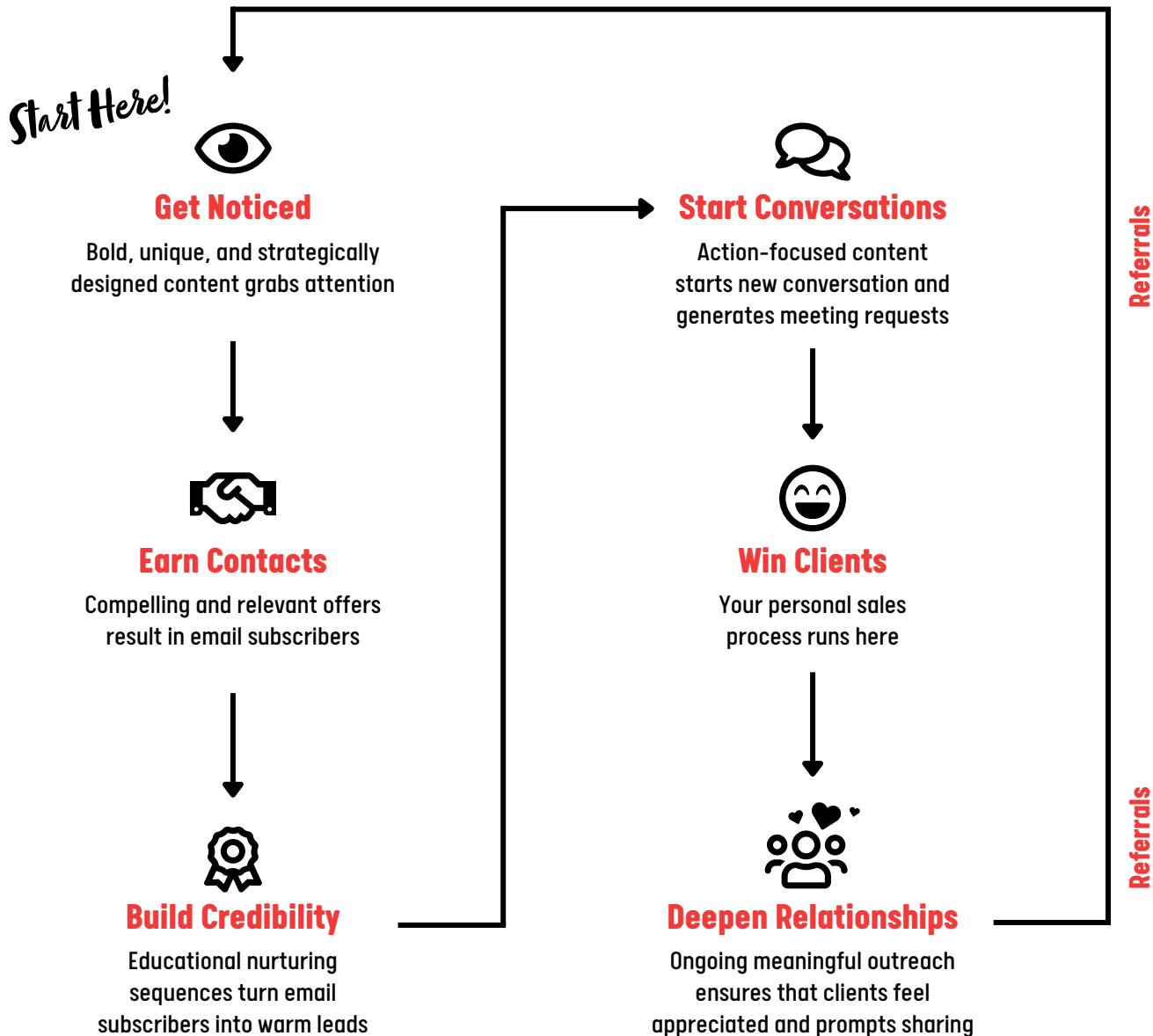
Achieve better results with a **COMPLETE STRATEGY**

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



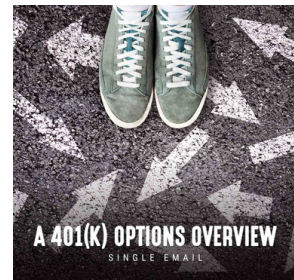
Win Clients



Deepen Relationships



Q2 2024 Financial Update
Quarterly Financial Update
Release 7/9*



A 401(K) Options Overview
Single Email

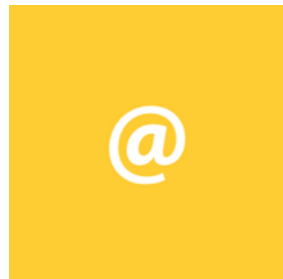


How Longevity Can Impact Retirement
Visual Insights Newsletter

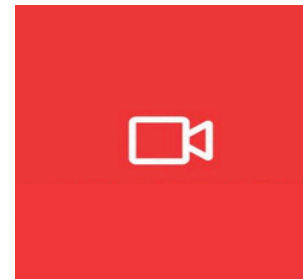
OR



Travel Safety Tips
Visual Insights Newsletter



Timely Emails
Launch as soon as possible

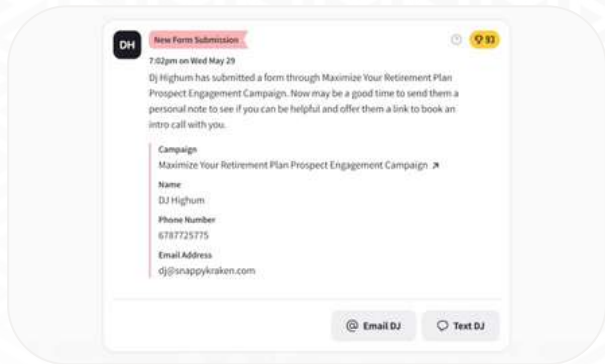
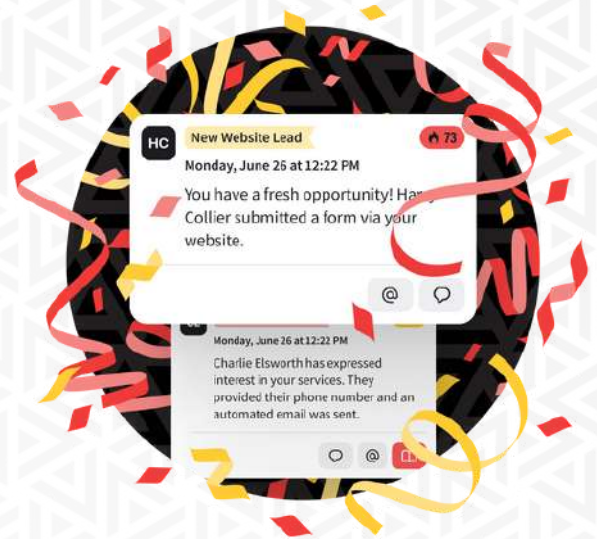


Personal Connection Video
of your choice or DIY

*Disclaimer: Content availability on enterprise platforms is dependent on enterprise approval.

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.

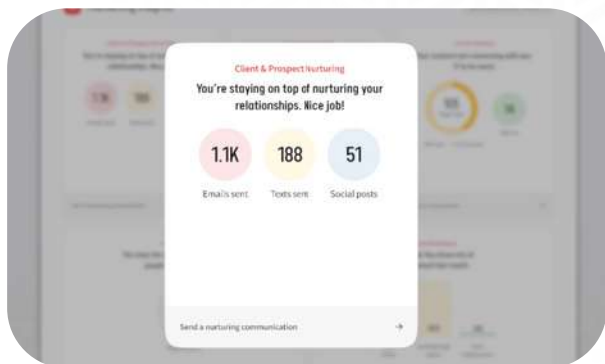
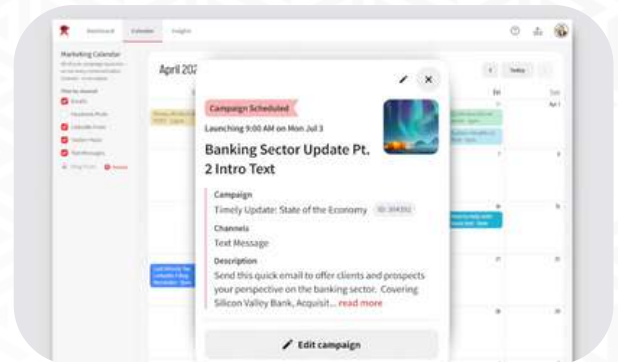


See activity & opportunities clearly

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.

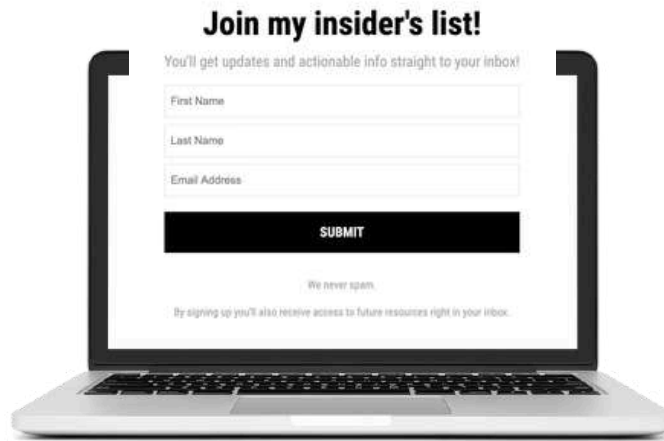
Let's start with the ESSENTIALS

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 soon.



Q2 2024 Financial Update
Quarterly Financial Update



The Role of a Power of Attorney
Single Email



Estate Planning Mistakes & How to Avoid Them
Visual Insights Newsletter

GET SOCIAL!

To do: Fill in the blanks to help you get started with a social media post. Post alongside an appropriate picture - the more personal, the better!

Social Media Prompts:



Post this on Independence Day - July 4th (for American audiences)

Happy Independence Day! It's an honor to be your trusted financial advisor. Today, take some time to reflect on what financial independence means to you. Is it about providing for your loved ones, following your passions without constraints, or retiring comfortably? Share your dreams with me, and let's work together to make them a reality.

Post this on First Day of Olympics Games Paris 2024 - July 26

The Olympics are here! As an avid fan of [LIST YOUR FAVOURITE OLYMPIC SPORT], I'm excited to cheer for Team USA [SUBSTITUTE WITH YOUR NATIONALITY AS NEEDED] this summer. Which events will you be watching?

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

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.

July 1
Canada Day

July 1
International Joke Day

July 4
Independence Day

July 13
National French Fries Day

July 17
National Hot Dog Day

July 26
First Day of Olympic Games Paris 2024

July 30
National Cheesecake Day

JULY MARKETING CALENDAR

Monday

Tuesday

Wednesday

Thursday

Friday

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