

THE **MARKETING MIX**

March 2024

3

Seasonal themes
& topics to help

**AMPLIFY YOUR
MARKETING
RESULTS**



Look inside for more tips!

Cold to Gold Framework | **Social Media Prompts** | **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:



Spring Cleaning



Preparing for Tax Season



National Women's History Month

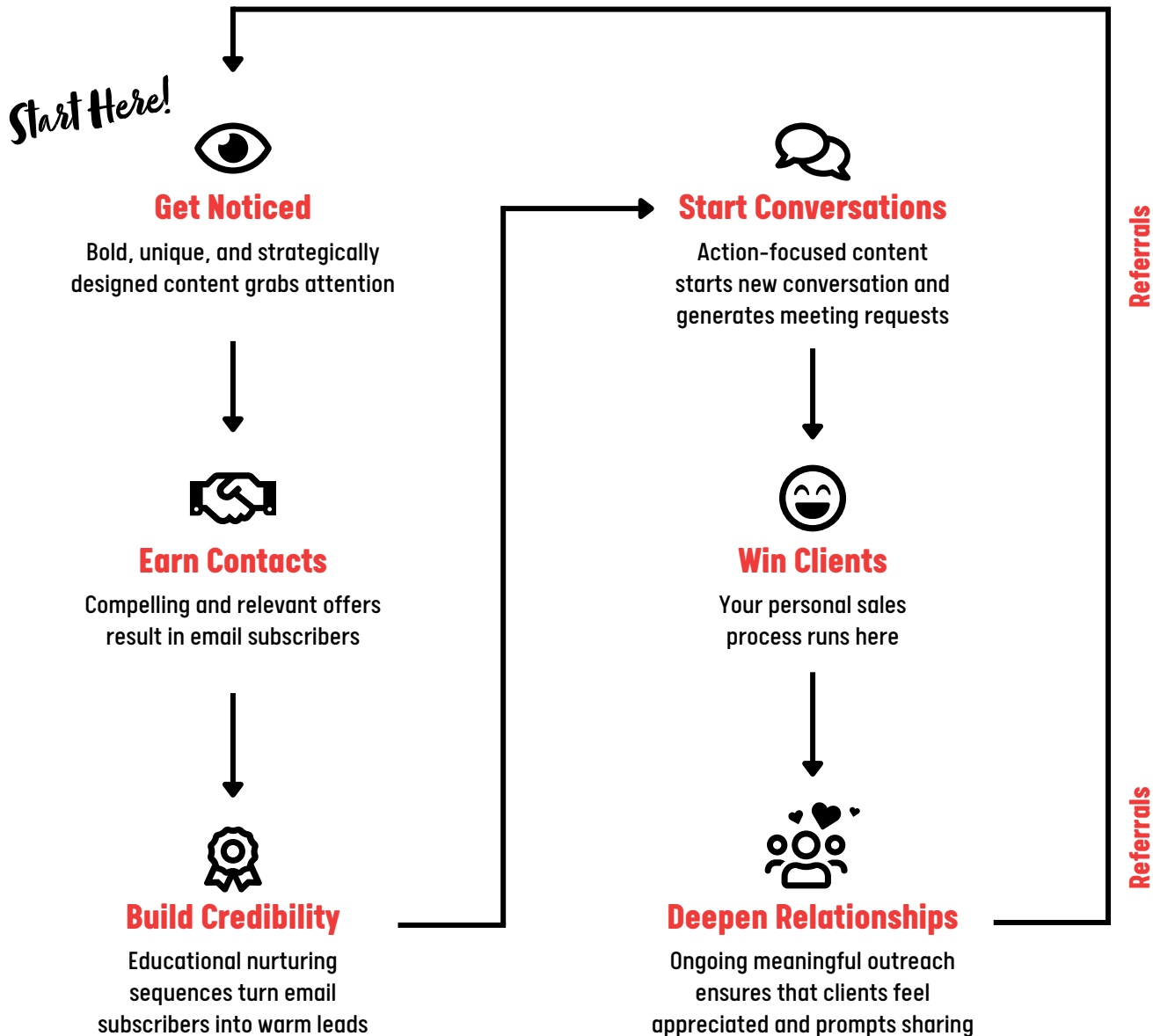
Achieve better results with a **COMPLETE STRATEGY**

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.

COLD TO GOLD

Just a little reminder :)



Get Noticed



Earn Contacts



Build Credibility



Start Conversations



Win Clients



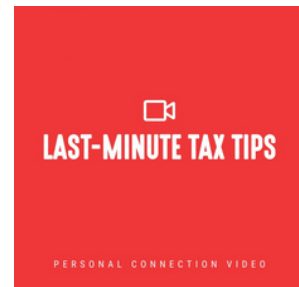
Deepen Relationships



HIDDEN TAX OPPORTUNITIES
PROSPECT ENGAGEMENT CAMPAIGN

2024 Hidden Tax Opportunities

Prospect Engagement Campaign



LAST-MINUTE TAX TIPS

PERSONAL CONNECTION VIDEO

Last-Minute Tax Tips

Personal Connection Video



WHAT HAPPENS TO THE STOCK MARKET DURING A PRESIDENTIAL ELECTION YEAR?
VISUAL INSIGHTS NEWSLETTER

What Happens to the Stock Market During a Presidential Election Year?

Visual Insights Newsletter



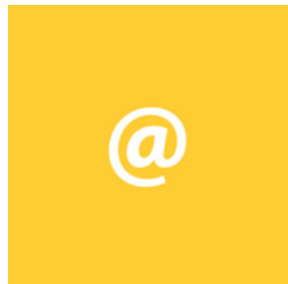
OR



FINANCIAL SPRING CLEANING
VISUAL INSIGHTS NEWSLETTER

Financial Spring Cleaning

Visual Insights Newsletter



Timely Emails



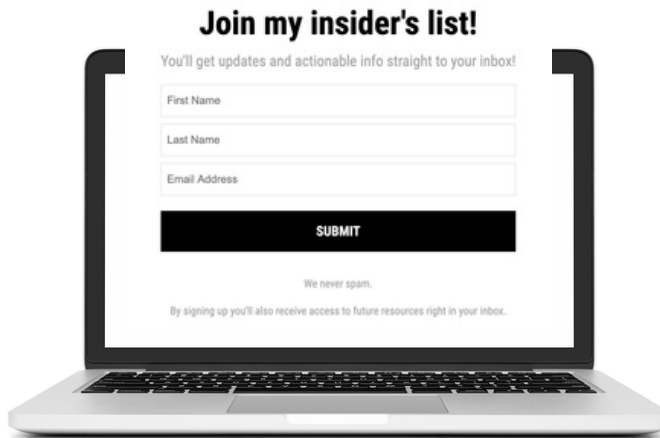
Let's start with the ESSENTIALS

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.

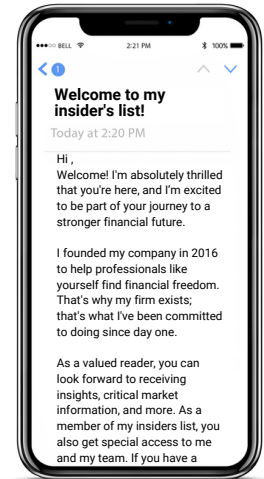
90-day New Client Onboarding



Website Opt-in Form

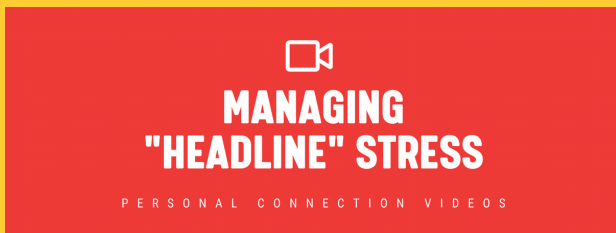


New Contact Welcome Email

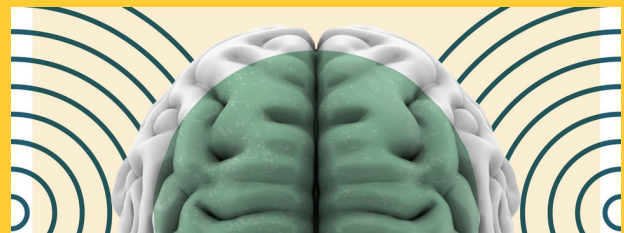


Coming Soon!

You won't want to miss these dropping soon.



Managing "Headline" Stress
Personal Connection Video



5 Common Behavioral Biases
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:

.....



Post a fun picture of your team instead!

Post this on Employee Appreciation Day - March 1

To our outstanding employees: You are the heartbeat of our organization. [SHOUTOUT INDIVIDUAL EMPLOYEES AND HOW THEY'VE CONTRIBUTED TO THE SUCCESS OF YOUR BUSINESS] Thank you for your hard work, loyalty, and endless dedication. Happy Employee Appreciation Day!

Post this on International Women's Day - March 8

Happy International Women's Day to all the trailblazing women out there! Today, we celebrate your strength, resilience, and achievements in every aspect of life. As we strive for gender equality, let's recognize the importance of financial empowerment in creating a more equitable world. From closing the gender pay gap to increasing women's access to financial resources, there's still work to be done. I'm dedicated to supporting women in their journey towards financial independence.

Post this anytime in March

Financial clutter can overwhelm any of us. Financial spring cleaning is all about routine maintenance in our financial lives. It's simple, only takes a few minutes, and comes with many benefits and rewards. Send me a message if you'd like to learn more.

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.

March 1
Employee Appreciation Day

March 8
International Women's Day

March 14
Pi Day

March 17
Saint Patrick's Day

March 23
Purim

March 29
Good Friday

March 31
Easter Sunday

MARCH MARKETING CALENDAR

Monday

Tuesday

Wednesday

Thursday

Friday

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