

# THE MARKETING MIX

November 2022

# 3

Seasonal **themes**  
& **topics** to help

**AMPLIFY YOUR  
MARKETING  
RESULTS**

*Plus!*

Soothe your  
clients nerves

and

Stay top of mind

Look inside for more tips!

Cold to Gold Framework

Social Media Prompt

Client Event Ideas

and more!

# FEATURED THIS MONTH

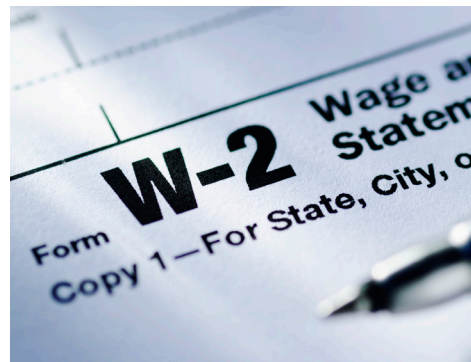
**Struggling with choosing informative and timely communications?** Here's one super easy approach that will help: Seasonal topics and themes. Check out these suggestions:



**Financial Literacy Month**



**National Gratitude Month**



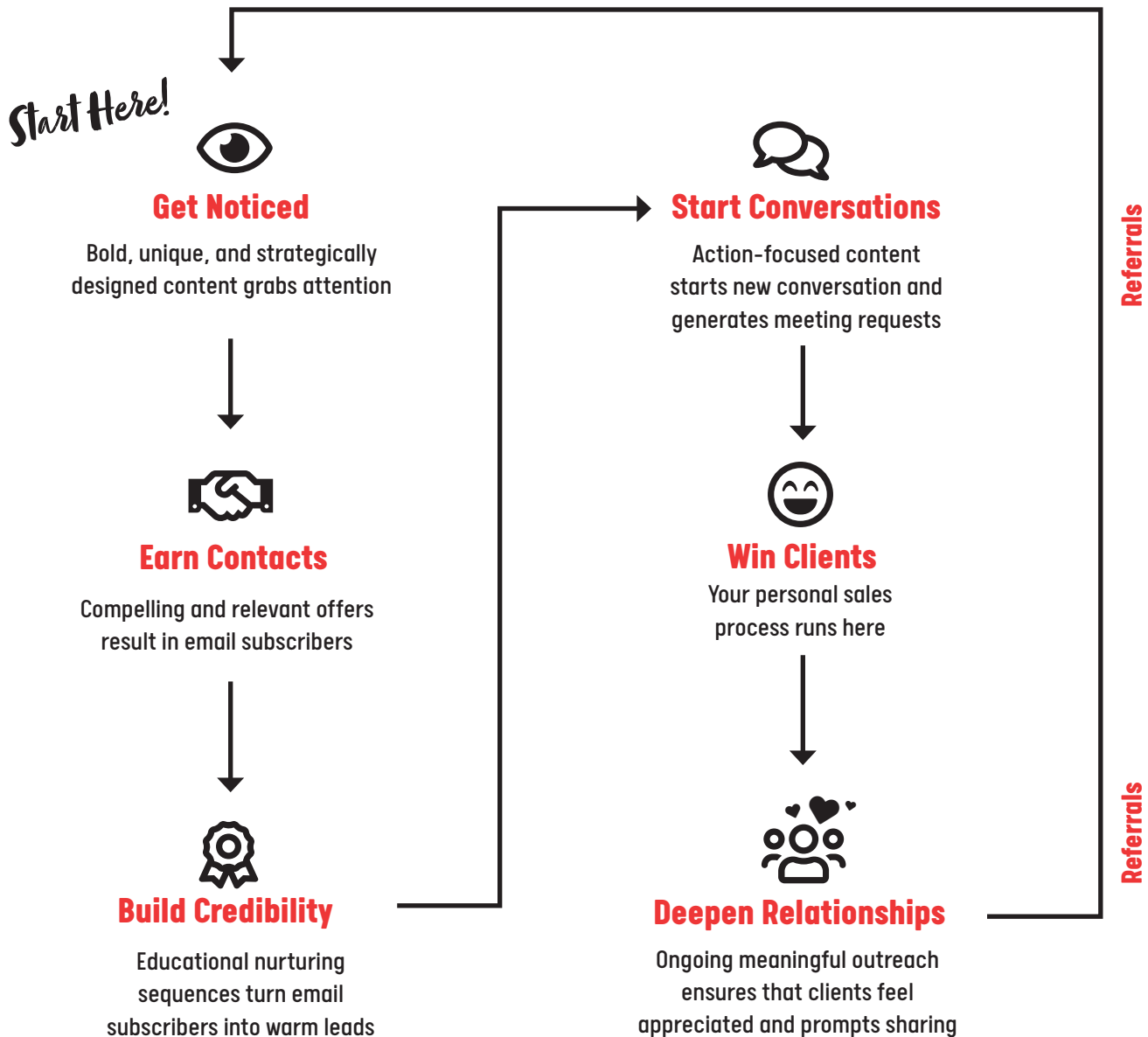
**Tax Loss Harvesting**

# 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**



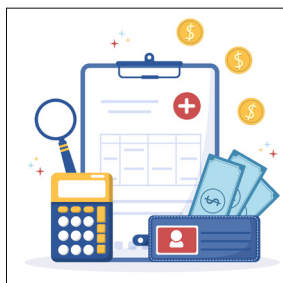
**Start Conversations**



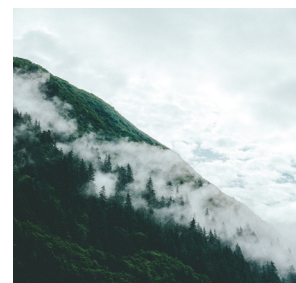
**Win Clients**



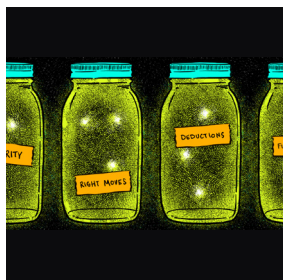
**Deepen Relationships**



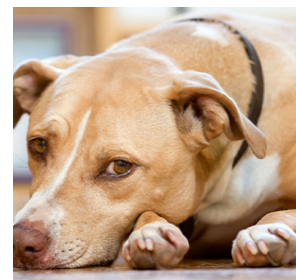
**Medicare Annual Enrollment**  
Lead Generation Campaign



**Creating Gratitude and Happiness**  
Visual Insights Newsletter



**Hidden Tax Opportunities**  
Lead Generation Campaign



**Gratitude**  
Personal Connection Video



**fpPathfinder EOY Planning Email**  
Email



# Be a reassuring presence for **RECESSION WORRIES**

## Your Recession Anxiety Playbook

A recession is looming and anxiety is high. *Historically, this the most important time for advisors to ramp up client (and prospect communications).* **Soothe your clients' nerves and reinforce the value of your advice.** Our timely communications are designed to give you a meaningful response to uncertainty in just minutes.



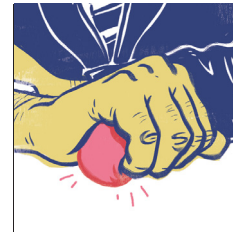
**The End of the World**  
Personal Connection Video



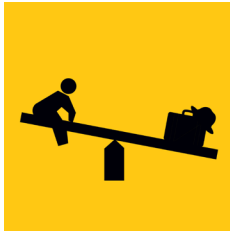
**Inflation True/False Quiz**  
Visual Insights Newsletter



**Setting Goals in Uncertain Times**  
Visual Insights Newsletter



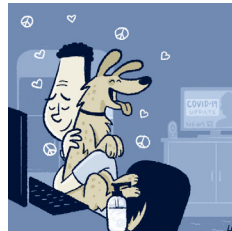
**Investor Recovery\***  
Lead Generation Campaign



**Retirement Income Teeter-Totter**  
Lead Generation Campaign



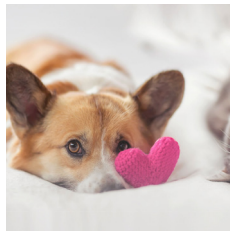
**Recession Investing**  
Prospect Engagement



**Gratitude and Optimism**  
Timely Email



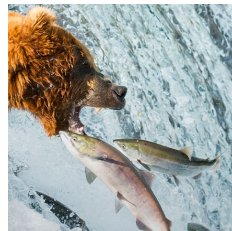
**Bulls Back in Town?**  
Timely Email



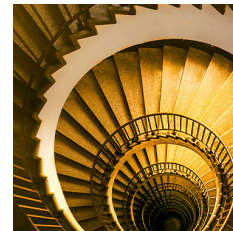
**It's Going to Be OK**  
Timely Email



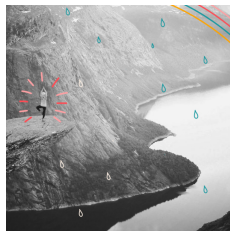
**Recession Investing**  
Lead Generation Campaign



**Bear Market Perspective**  
Personal Connection Video



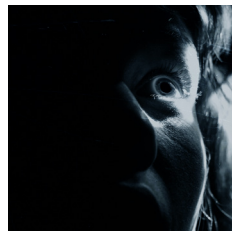
**Recession Worries?**  
Personal Connection Video



**Silver Linings of Uncertainty**  
Visual Insights Newsletter



**Bull vs Bear Market Quiz**  
Visual Insights Newsletter



**Retiring in Uncertain Times**  
Lead Generation Campaign



**The Power in Uncertainty**  
Personal Connection Video

# STAY TOP OF MIND

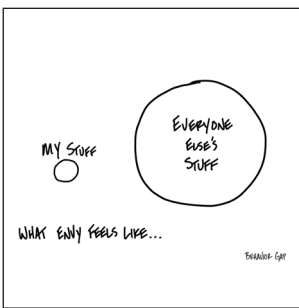
Building a base of loyal clients is one of the most important yet challenging things you can do to grow your business.

## 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.

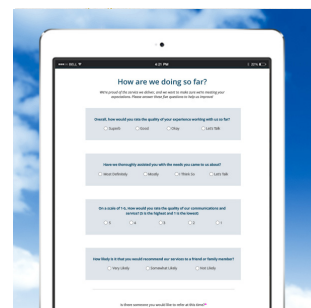
### Campaign Suggestions:



**Behavior Gap by Carl Richards**  
*(Add On)*



**VIN: Retirement in 2050**  
Visual Insights Newsletter



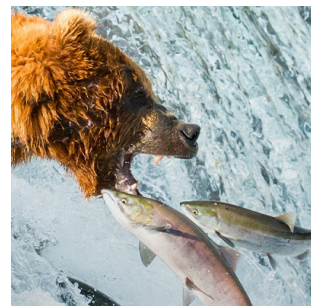
**90-day New Client Onboarding**  
Client Communications



**VIN: Inflation True or False Quiz**  
Visual Insights Newsletter



**Avoiding Scams Single Topic Email**  
Single Topic Email



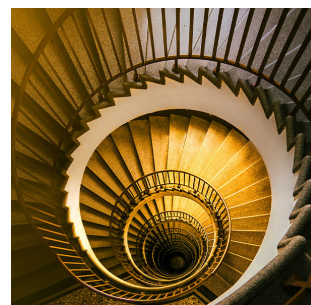
**PCV: Bear Market Perspectives**  
Personal Connection Video



**Seasonal Email Card (Fall)**  
*Comes out 9/29*



**Timely Emails**  
Timely Email

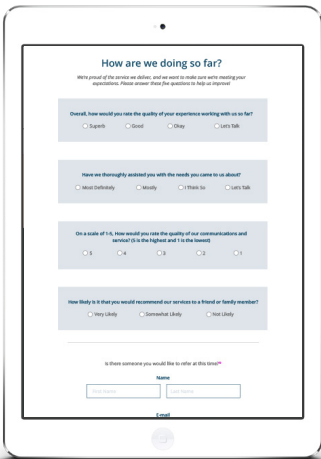


**PCV: Recession Worries?**  
Personal Connection Video

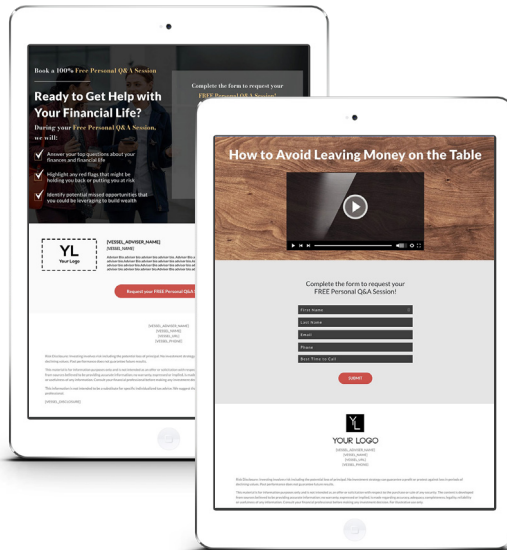
# Let's start with the ESSENTIALS

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.

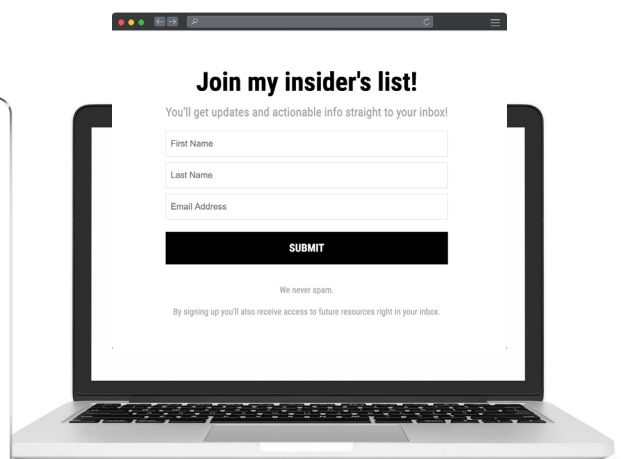
## 90-day New Client Onboarding



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



## Website Opt In Form



*Coming Soon!*

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



**Winter Seasonal Card**  
Email



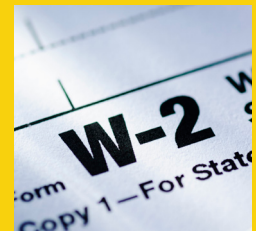
**Simple Gratitude Practices**  
Visual Insights Newsletters



**EOY Tax Planning**  
Prospect Engagement



**Retiring Confidently in a Crash**  
Lead Generation



**Tax Loss Harvesting**  
Email

# 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 this on November 1st - Día de Muertos (Día de Muertos is celebrated on the 1st and 2nd - and may include celebrations on October 31st - but the 1st is considered the official start of the holiday)**

Relationships are more valuable than any possession (or investment!). Día de Muertos may bring to mind loved ones who have passed on. But this joyful holiday is also centered around gatherings with living family and friends, good food, gifts, and laughter! My family and I have been strengthening our relationships through [ACTIVITY, TRADITION, OR HOLIDAY OBSERVANCE]. How have you been celebrating your relationships lately?

## Post this on November 11th - Veterans Day

If you're like me, you thank veterans for their service every time you meet them. I'm so grateful for the veterans in [LOCATION] community and across the nation. On Veterans Day, we have the opportunity to formally honor their dedication and patriotism. What do you respect most about the veterans in your life? How do you show them your gratitude and support today and throughout the year?

## Post this on November 13th - World Kindness Day

Over the holidays, budgets seem to swell to include thousands of extra line items! Between gifts, trips, and charitable donations, expressing love and appreciation can feel like it comes at a steep cost. But! acts of kindness are free. On World Kindness Day, how can you show PEOPLE that they are every bit as important as the THINGS you spend money on this holiday season? I'm starting by [PERSONAL ACT OF KINDNESS].

## Post this on November 29th - Giving Tuesday

Why do we volunteer, donate food, or contribute to a cause? Even when there are no tangible returns, research shows that giving benefits you just as much as the recipient of your generosity! It increases happiness, creates a sense of gratitude, and even impacts you socially and physically. I'm kicking off [NATIONAL PHILANTHROPY DAY OR GIVING TUESDAY] with [PERSONAL ACT OF PHILANTHROPY OR GIVING]\*. How are you giving of yourself and your gifts today?

\*If you mention a specific cause, consider explaining why it's important to you! Here's an example: "I'm kicking off National Philanthropy Day with a donation to my local food bank. I believe no one in my community should go hungry when I have so much to give!"

## 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.

Nov 1  
All Saints' Day

Nov 6  
Daylight Savings Time Ends

Nov 8  
Election Day

Nov 13  
Caregiver Appreciation Day

Nov 14  
National Pickle Day  
World Diabetes Day

Nov 24  
Thanksgiving

Nov 25  
Native American Heritage Day



# GATHER 'ROUND

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



## **Pie it Forward**

Team with a local charity to host a pie sale, where all proceeds are donated directly toward hot meals for homebound seniors, or those less fortunate.

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## **Wine or Whiskey Tasting Evening**

Partner with a local winery or distributor to host a tasting event. Invite your clients, and COIs to deepen those relationships with an evening of relaxation, fun and flavor!



# NOVEMBER MARKETING CALENDAR

Monday	Tuesday	Wednesday	Thursday	Friday
	1	2	3	4
7	8	9	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30		