

THE MARKETING MIX

October 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:



Health Literacy Month



Financial Planning Month



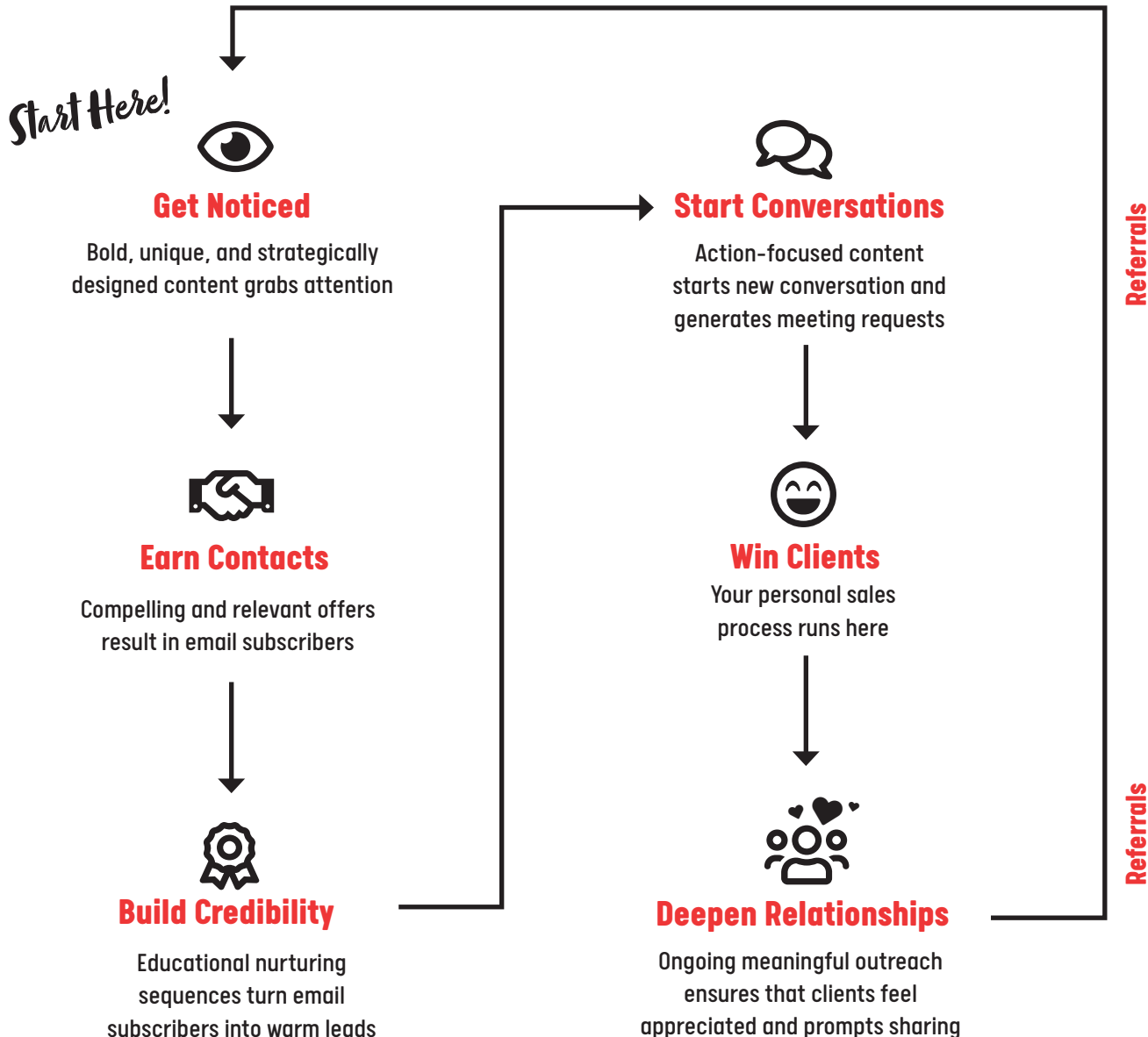
Long-Term Care Planning Month

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!



4 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



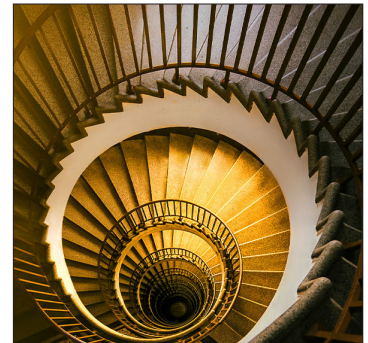
Recession Investing
Lead Generation Campaign



Inflation True/False Quiz
Visual Insights Newsletter



Social Security
Prospect Engagement Campaign



Recession Worries?
Personal Connection Video



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.



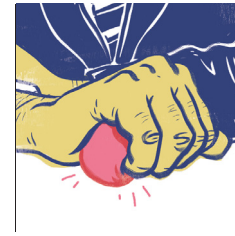
The End of the World
Personal Connection Video



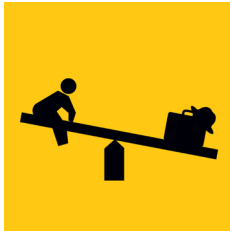
Inflation True/False Quiz
Visual Insights Newsletter



Setting Goals in Uncertain Times
Visual Insights Newsletter



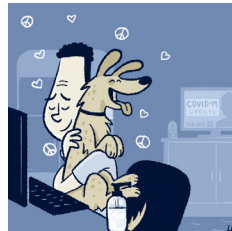
Investor Recovery*
Lead Generation Campaign



Retirement Income Teeter-Totter
Lead Generation Campaign



Recession Investing
Prospect Engagement



Gratitude and Optimism
Timely Email



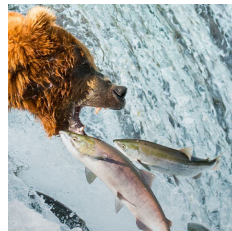
Recession
Timely Email



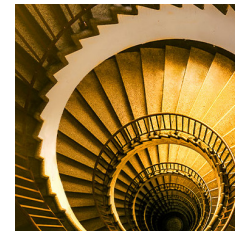
It's Going to Be OK
Timely Email



Recession Investing
Lead Generation Campaign



Bear Market Perspective
Personal Connection Video



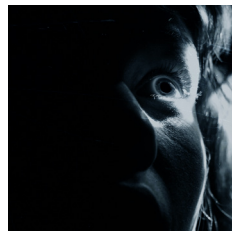
Recession Worries?
Personal Connection Video



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

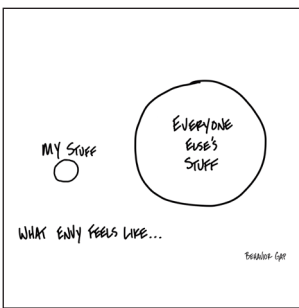
Building a base of loyal clients is one of the most important yet challenging things you can do to grow your business.

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.

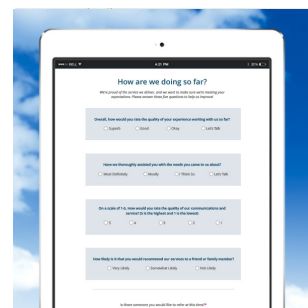
Campaign Suggestions:



Behavior Gap by Carl Richards
(Add On)



VIN: Retirement in 2050
Visual Insights Newsletter



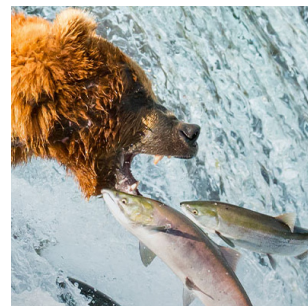
90-day New Client Onboarding
Client Communications



VIN: Inflation True or False Quiz
Visual Insights Newsletter



Avoiding Scams Single Topic Email
Single Topic Email



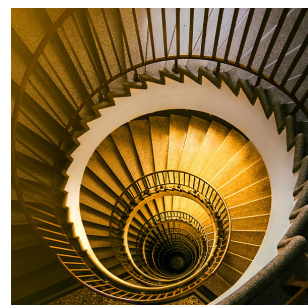
PCV: Bear Market Perspectives
Personal Connection Video



Seasonal Email Card (Fall)
Comes out 9/29



Timely Emails
Timely Email

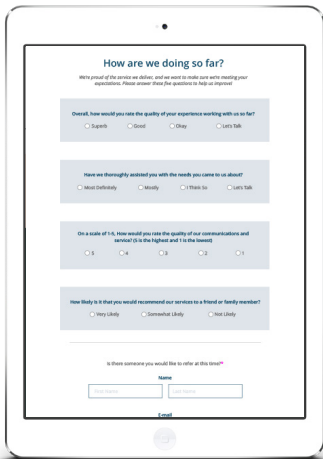


PCV: Recession Worries?
Personal Connection Video

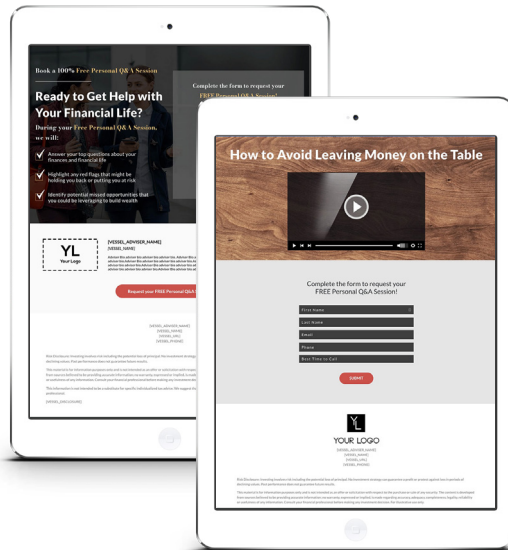
Let's start with the ESSENTIALS

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.

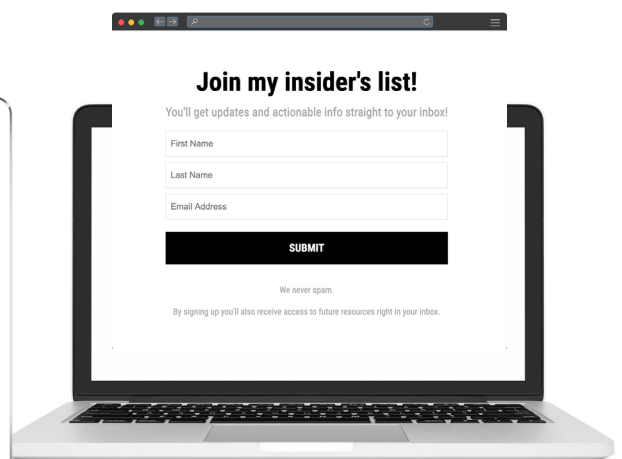
90-day New Client Onboarding



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



Website Opt In Form

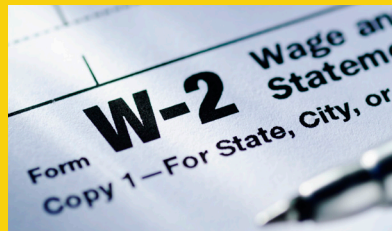


Coming Soon!

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



How to Weather a Recession
Visual Insights Newsletter



EOY Tax Opportunities
Prospect Engagement



Retirement
Lead Generation

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 October 5th - World Teachers Day

We learn from teachers of all kinds! On World Teachers Day, I'm personally grateful for the opportunity to teach members of [LOCATION] community about optimizing their financial well-being, as well as for the opportunity to learn [from each of my clients OR INSERT A SPECIFIC LESSON LEARNED FROM A CLIENT]. As Robert Heinlien said, "When one teaches, two learn." What have you learned recently? Which teacher(s) have had the biggest influence in your life?

Post this on October 22nd - National Make a Difference Day

It's easy for daily life to be consumed with personal troubles and checklist items. On National Make a Difference Day, I invite you to consider how your words, skills, and passions can make your relationships and [LOCATION] community stronger. I plan to spend today [INSERT HOW YOU PLAN TO MAKE A DIFFERENCE, SUCH AS VOLUNTEERING, DONATING, OR MENTORING]. How will YOU reach out and make a difference today?

Post this on October 24th - Diwali (Diwali is a five-day festival, but the 24th is the peak of the celebration)

Diwali is a celebration of the triumph of light over darkness, goodness over evil, and knowledge over ignorance. It's a festival associated with Lakshmi - the Hindu goddess of prosperity - and Ganesha - the god of removing obstacles. You don't have to be part of the Diwali festivities to see the need for a little more light and goodness in today's world. Which obstacles to greater knowledge or prosperity in your life are within your power to remove? And how can I help clear your path?

Post this on October 31st - Halloween

This is the one day of the year that ghosts and goblins roam the streets, but it's not the only day that scary things can happen. This year has been full of uncertainty (and outright terrors!) that may be keeping you up at night. I've certainly been affected by the uneasiness of [INSERT PERSONAL ANXIETY, SUCH AS INFLATION OR GLOBAL UNREST]. Take this Halloween as an opportunity to examine the frights in your life - which monsters can you exterminate today? Which fiends do you need to learn to live with for a while longer? Most importantly, how can I support you?

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.

Oct 1
International Coffee Day

Oct 4
National Golf Day

Oct 4-5
Yom Kippur

Oct 10
Indigenous Peoples Day

Oct 15
Medicare Open Enrollment Start Date

Oct 21
International Nacho Day

Oct 29
National Cat Day

GATHER 'ROUND

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



Pumpkin Patch at Your Office

Invite your clients to a fall pumpkin event! Bring the pumpkins to your office parking lot, serve coffee and pumpkin flavored pastries. Invite clients to pick out a pumpkin, and even have a pumpkin-carving contest!

Social Security/Medicare Webinar

Educate prospects and clients on Medicare enrollment and partner with the Social Security Administration who has speakers in local communities that will provide an update on the state of Social Security.



OCTOBER MARKETING CALENDAR

Monday	Tuesday	Wednesday	Thursday	Friday
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31				