

# THE MARKETING MIX

December 2023

Seasonal themes  
& topics to help  
**AMPLIFY YOUR  
MARKETING  
RESULTS**

*Look inside for more tips!*

**Cold to Gold Framework | Social Media Prompts | Monthly Calendar | and more!**



Achieve better results with a

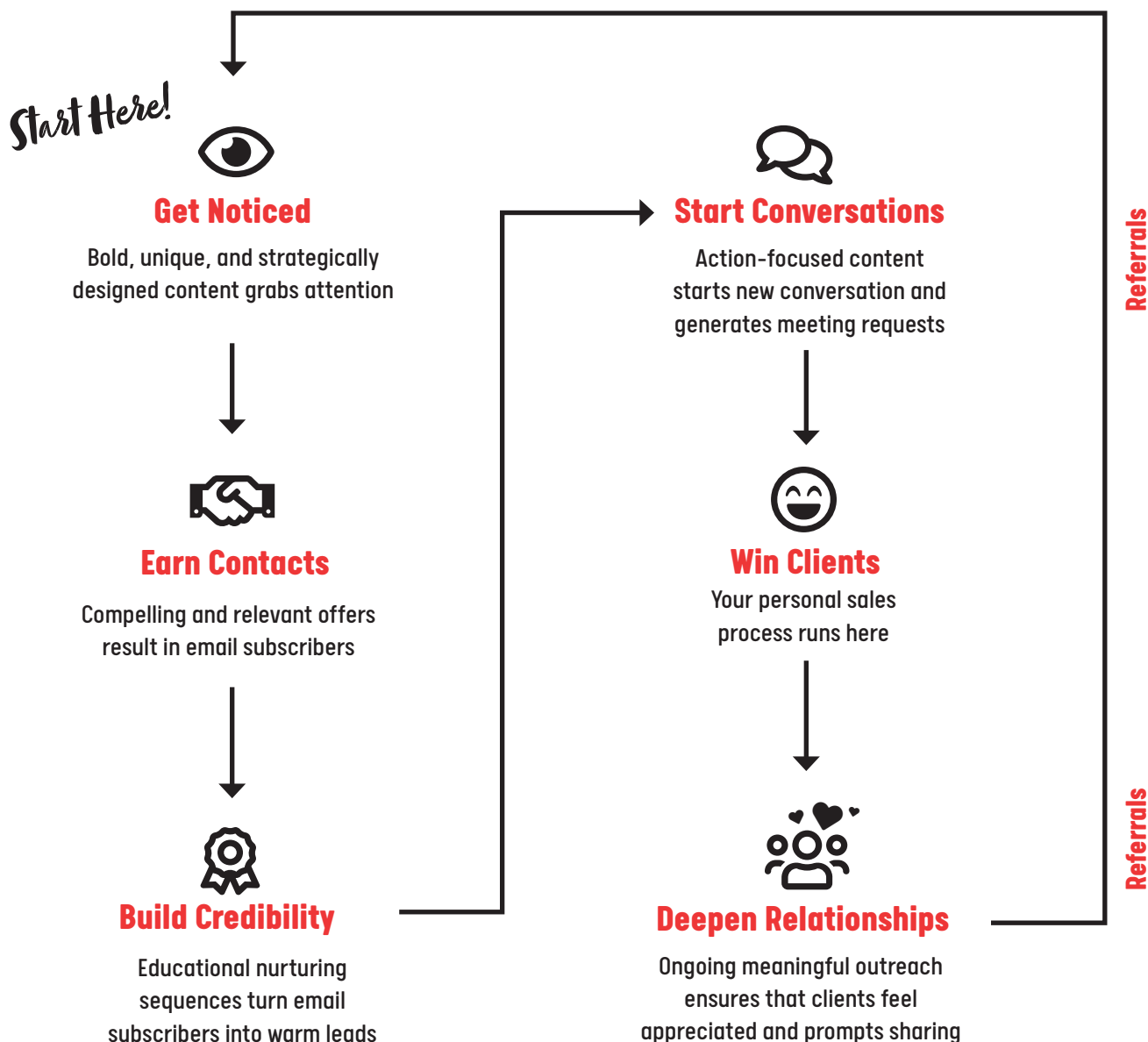
# COMPLETE STRATEGY

*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.

**WORTH THE GOLD**

*Just a little reminder ;)*



**Get Noticed**



**Earn Contacts**



**Build Credibility**



**Start Conversations**



**Win Clients**

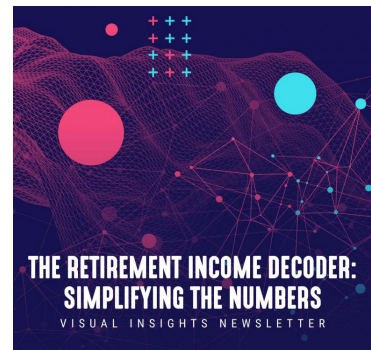


**Deepen Relationships**



**End Of Year Planning Email (2023)**

Single Email



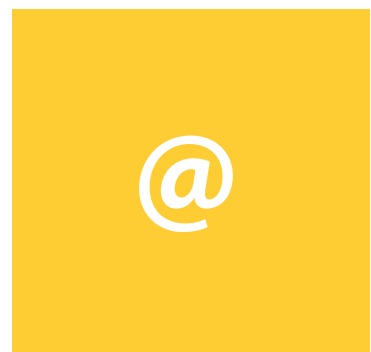
**The Retirement Income Decoder: Simplifying the Numbers**

Visual Insights Newsletter



**Investment Opportunities in Volatile Markets**

Prospect Engagement Campaign



**Timely Emails**



# 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.



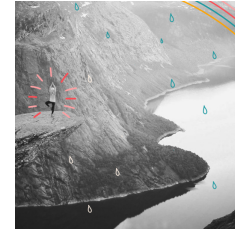
**Inflation True/False Quiz**  
Visual Insights Newsletter



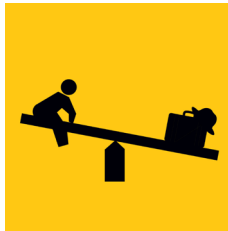
**Burnout & Willpower Gap**  
Visual Insight Newsletter



**How to Weather  
a Recession**  
Visual Insights Newsletter



**Silver Linings of  
Uncertainty**  
Visual Insights Newsletter



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



**Recession Investing**  
Lead Generation Campaign



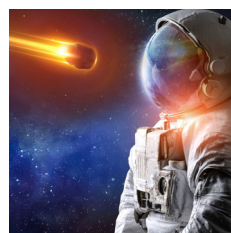
**Investment Recovery**  
Lead Generation Campaign



**Retire Confidently  
in a Crash**  
Lead Generation Campaign



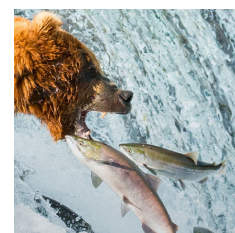
**Recession Survival  
Strategies**  
Lead Generation Campaign



**Recession Investing**  
Prospect Engagement



**Investment Recovery**  
Prospect Engagement



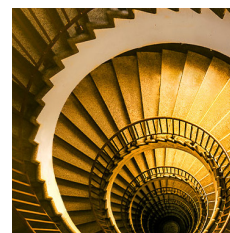
**Bear Market  
Perspective**  
Personal Connection Video



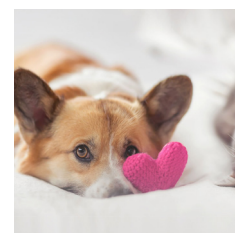
**The End of the World**  
Personal Connection Video



**The Power in Uncertainty**  
Personal Connection Video



**Recession Worries?**  
Personal Connection Video



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

# 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

A tablet displaying a client onboarding form. The form includes sections for rating the quality of service, answering questions about the client's needs, and providing contact information. The form is titled "How are we doing so far?" and includes a "Submit" button at the bottom.

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

A tablet displaying a prospect nurturing campaign form. The form includes a video player titled "How to Avoid Leaving Money on the Table" and a form to request a free personal Q&A session. The form is titled "Ready to Get Help with Your Financial Life?" and includes a "Submit" button at the bottom.

## Website Opt In Form

A laptop displaying a website opt-in form. The form includes a heading "Join my insider's list!", a subheading "You'll get updates and actionable info straight to your inbox!", and fields for First Name, Last Name, and Email Address. A "SUBMIT" button is at the bottom. Below the button, it says "We never spam." and "By signing up you'll also receive access to future resources right in your inbox."

# Coming Soon!

You won't want to miss these dropping soon.



**Paying Down Debt**  
Single Email



**EOY Hidden Tax Opportunities**  
Lead Generation Campaign



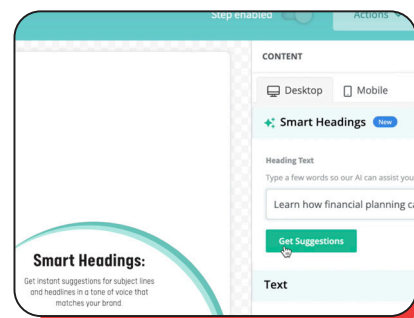
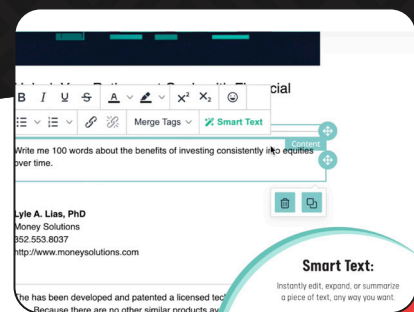
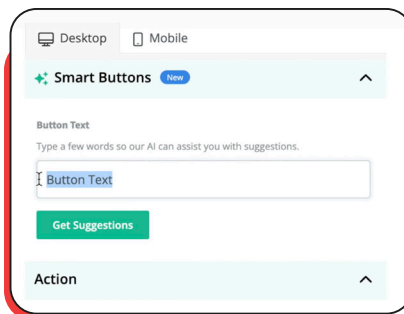
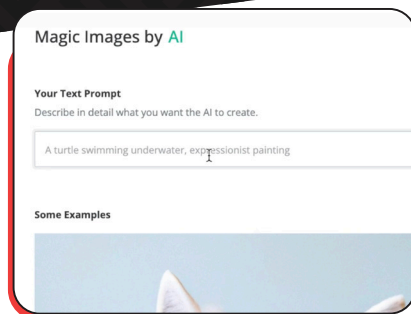
**EOY Hidden Tax Opportunities**  
Prospect Engagement Campaign

Have you tried...

# OUR AI-POWERED EMAIL BUILDER?

Go from idea to finished email in minutes.

This AI tool will help speed up your content creation time. You can describe any message or images you want to create and it's generated instantly. In less than 10 minutes, you can have a branded and personalized email that's ready to deploy, letting your clients and prospects know that they matter most.



Give it a try! Head to the library and select **'AI-Powered Email Builder'** to get started.



# 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 Prompts of the Month:

### Post on Hanukkah - Dec 7 - Dec 15

Wishing my Jewish friends in the [LOCATION] community a happy Hanukkah! The Hanukkah story is an incredibly inspiring narrative of resilience, highlighting the importance of not giving up even in the face of adversity. Whether you celebrate or not, I'd love to hear how you've persevered this year: Did you pursue a successful career change, achieve a significant milestone, or overcome health challenges?

### Post on Christmas Eve or Christmas Day - Dec 24/25

As the year comes to a close, I'm grateful for the simple joys that make the Christmas season truly special [OPTIONAL: Include examples of simple joys, e.g. "like baking cookies with my children"]. It's not about the size of the presents under the tree but the love in our hearts and the smiles on our faces. This holiday season, let's prioritize kindness, compassion, and togetherness. Wishing you all a holiday season filled with warmth and love!

### Post on New Year's Eve - Dec 31

Here's a glimpse of some of my favorite moments from 2023 [Include photos of your highlights from 2023]. It's been especially fulfilling to serve [YOUR TARGET AUDIENCE] in the [LOCATION] community. Looking forward to 2024, one of my resolutions is to provide more financial education to help you navigate life's ups and downs. What goals are you aiming for in the coming year? Let's work together to make them happen!

## Additional Posts

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.

Dec 1

**World AIDS Day**

Dec 3

**International Day of Persons with Disabilities**

Dec 7 - 15

**Hanukkah**

Dec 21

**Winter Solstice**

Dec 23

**Festivus**

Dec 24

**Christmas Eve**

Dec 25

**Christmas Day**

Dec 26

**Boxing Day**

Dec 26 - Jan 1, 2024

**Kwanzaa**

Dec 31

**New Year's Eve**

# DECEMBER MARKETING CALENDAR

Monday	Tuesday	Wednesday	Thursday	Friday
27	28	29	30	31
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29