

# THE MARKETING MIX

November 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!**

# SEASONAL TOPICS

**Struggling with creating informative and timely communications?** Here are suggested seasonal topics. Creating content around these themes will lead to higher engagement with your audience due to their timeliness!

**No time to create your own content?** No problem, check out our suggested ready-to-go campaigns on Page 4.



**National Gratitude Month**



**Veterans & Military Family Month**



**National Home Care & Hospice Month**

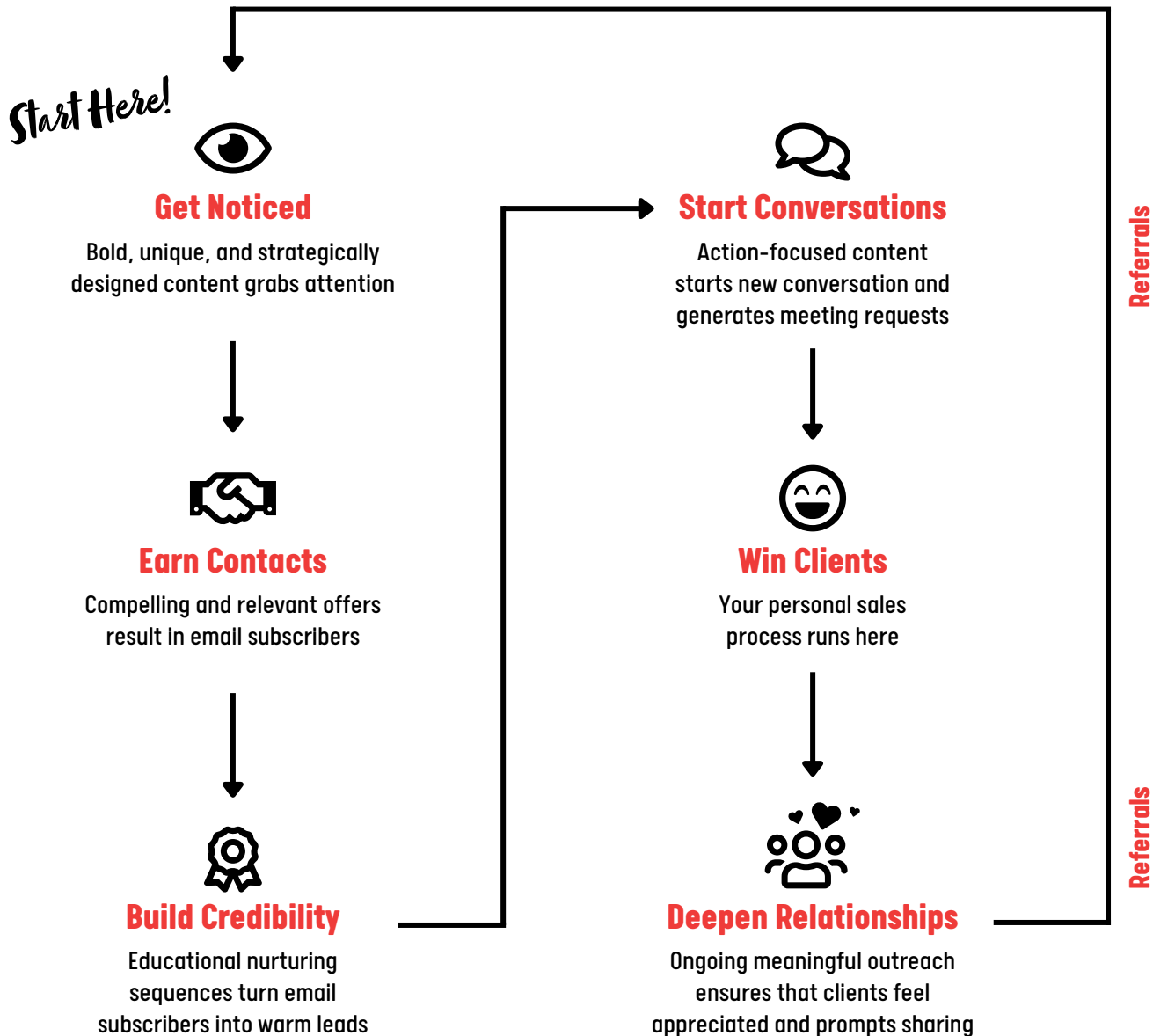
# Achieve better results with a **COMPLETE STRATEGY**

*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! Marketing Mix Session.

[Register here](#)

COLD TO GOLD

Just a little reminder :)



**Get Noticed**



**Earn Contacts**



**Build Credibility**



**Start Conversations**



**Win Clients**



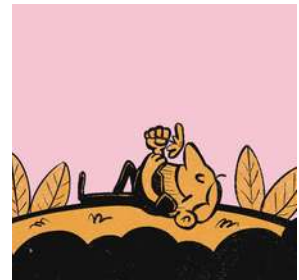
**Deepen Relationships**



**What Is Your Money Personality?**  
Visual Insights Newsletter



OR



**How Simple Gratitude Practices Can Make Life Better**  
Visual Insights Newsletter



**EOY Hidden Tax Opportunities\***  
Lead Generation Campaign



OR



**Medicare**  
Lead Generation Campaign



**Timely Emails**  
Launch as soon as possible



# 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 dropping in the following weeks.



**Empowering Financial Conversations**  
Lead Generation Campaign



**Customizable Education Event Campaign**  
Client Retention Campaign



**Annuities & Guaranteed Income**  
Lead Generation Campaign

# 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:

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#### Post this on Veterans Day - November 11th

To the veterans in [LOCATION] and across the nation: thank you for your service and sacrifice.

🙏 On this Veterans Day, how can we go beyond just words to show our gratitude? Whether it's volunteering, supporting veterans' causes, or just listening to their stories, there's always a way to give back to those who gave so much.



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

Kindness is a currency that never runs out. As the holiday season approaches, #WorldKindnessDay is a great reminder that we don't need to spend money to make someone feel valued. A thoughtful gesture, a word of encouragement, or an unexpected favor can go a long way. How will you pay it forward today? I'm starting with [PERSONAL ACT OF KINDNESS].

### 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.

- Daylight Savings Time Ends - Nov 3
- Election Day - Nov 5
- World Diabetes Day - Nov 14
- American Thanksgiving - Nov 28
- Native American Heritage Day - Nov 29
- Small Business Saturday - Nov 30



# GATHER 'ROUND

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



## **Pie It Forward**

Partner with a local charity to host a pie sale, with all proceeds supporting hot meals for homebound seniors and those in need.

It's a meaningful way to give back while showing clients and COIs your commitment to making a positive impact in the community.

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## **Wine or Whiskey Tasting Event**

Host an exclusive wine tasting event by partnering with a local winery or distributor. Invite your clients and COIs for an evening of fine wine, networking, and meaningful connections.

It's the perfect opportunity to strengthen relationships in a relaxed, enjoyable atmosphere.



# NOVEMBER MARKETING CALENDAR

See when each of your emails + social posts are scheduled on your Marketing Hub Calendar!\*

Monday	Tuesday	Wednesday	Thursday	Friday
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29

\*Marketing Hub availability on enterprise platforms is dependent on enterprise approval.