



Your Marketing Onboarding Playbook

You empower them. We empower you.

Congratulations!

Launching a new marketing platform for your financial professionals is a big deal.

We understand your unique needs and we are here to support you in delivering a successful launch so your financial professionals are guaranteed to succeed.



Onboarding Journey

While each enterprise will have a custom journey based on preferences and a unique launch, we've laid out sample onboarding timelines and recommendations with which we have seen success.

Home Office Readiness

2-4 weeks

Build the Buzz

2-3 weeks

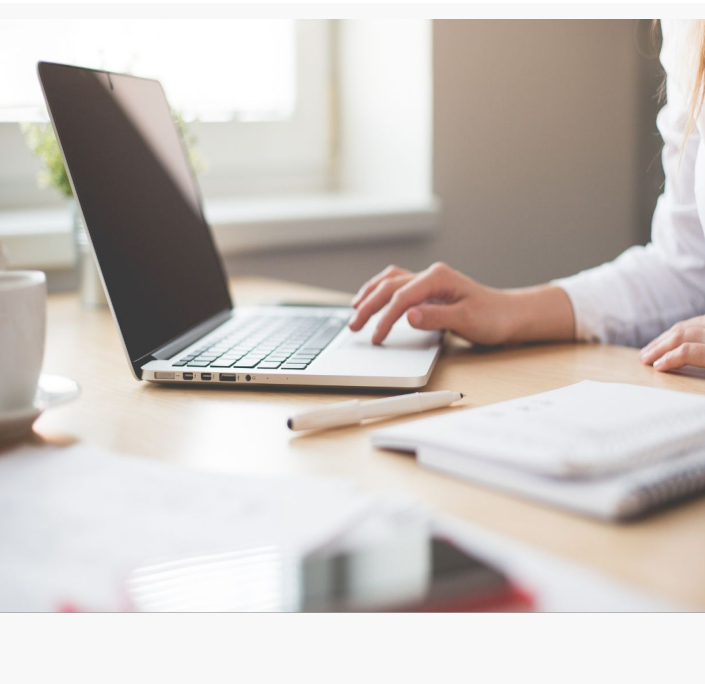
Adoption

6-8 weeks (launch date)

Ongoing Support

Once onboarded/adopted

Onboarding Marketing Overview



- This deck provides a suggested timeline and communications plan to onboard financial professionals to our FMG platform effectively
- Timelines and details are adjustable based on specific rollout needs
- This is a suggested rollout plan; however, times and details may vary based on your unique rollout
- FMG provides customizable templated communications that your enterprise can use as a starting point and customize as necessary

Home Office Readiness Phase

Goal: To provide training to the home office on all FMG components, including communications, training, plans, and resources.

Activity	Topic	Ideal Timeframe	Audience	Responsible
Planning	Planning Meeting with Stakeholders	4 - 6 weeks before launch	Home Office Staff	FMG Enterprise Success Team + Enterprise
Training	Dashboard training - Enterprise Marketing Team	~ 4 weeks before launch	Home Office Staff	
Training	Dashboard training - Enterprise Compliance Team	~ 4 weeks before launch	Home Office Staff	
Training	Publisher Training - Enterprise Marketing Team	~ 4 weeks before launch	Home Office Staff	

Build the Buzz Phase Phase

Goal: To generate excitement for the launch and increase webinar registrations to prepare financial professionals for the activation of their tools.

Activity	Topic	Ideal Timeframe	Audience	Responsible
Email 1	Initial reachout with webinar 1 invite	2 weeks before webinar 1	Financial Professional	Enterprise
Email 2	1 week reminder to register for webinar (non-registrants)	1 week before webinar 1	Financial Professional	Enterprise
Email 3	1 day reminder to register for webinar 1	Day before webinar 1	Financial Professional	Enterprise
Webinar 1	Demo of marketing tools	1 week before launch	Financial Professional	FMG or Enterprise
Email 4	Webinar 1 follow up (with replay) + webinar 2 invite	1-3 days after webinar 1	Financial Professional	Enterprise
Email 5	1 day reminder to register for webinar 2	Day before webinar 2 and launch	Financial Professional	Enterprise

Adoption Phase

Goal: To guide advisors on integrating FMG tools into their office marketing processes. Teach them the best practices to succeed in their marketing efforts and effectively utilize their FMG marketing tools.

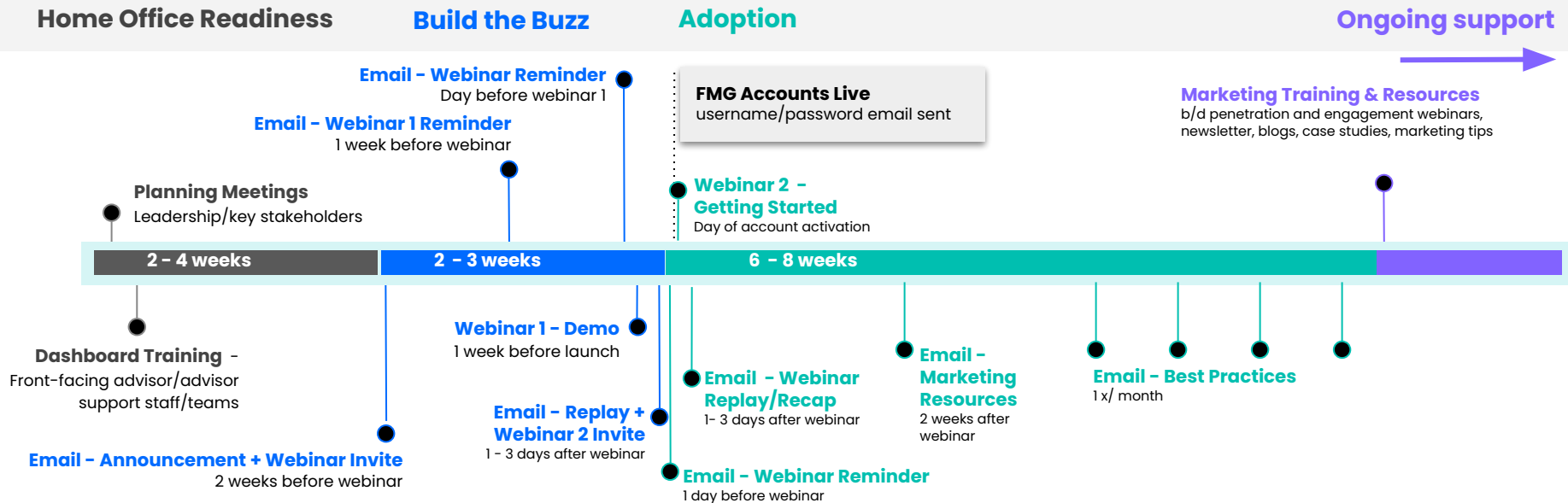
Activity	Topic	Ideal Timeframe	Audience	Sender / Host
Activation Day	Launch day	1 month after email 1 (initial reachout)	Financial Professional	Enterprise
FMG Login Credentials	Logging in	First date of use or tool activation date if batch activation	Financial Professional	Enterprise
Welcome Email	Getting started resources	First date of use or tool activation date if batch activation	Financial Professional	Enterprise
Webinar 2	Getting started - setup/using your new tools	First date of use or tool activation date if batch activation	Financial Professional	Enterprise
Email 6	Account activation with resources, and webinar 2 replay	Launch day	Financial Professional	Enterprise
Email 7	Adoption / Training and Resources	1 week after account activation	Financial Professional	FMG or Enterprise
Email 8 - 10	Adoption / Best Practices	4 emails - sent 1x/month starting month after account activation	Financial Professional	FMG or Enterprise

Ongoing Support Phase

Goal: To provide ongoing marketing support and resources and turn FMG customers into super users and raving fans.

Activity	Topic	Ideal Timeframe	Sender / Host
Webinars	B/D exclusive webinars, FMG all customer webinars	Ongoing	FMG or Enterprise
Masterclass	Marketing Masterclass (2.0 training to advance in marketing)	As needed, 6-week series	FMG
Case Studies	Advisor case studies	As needed	FMG
Blogs	Blogs for enterprise and FMG newsletters	As needed	FMG
Newsletter	Marketing newsletter/marketing tips emails	Ongoing	FMG

Sample Timeline: Communications & Training



This timeline does not include automated Zoom reminders sent at the time of registration, the week before the event, or the day of the event. It also does not include regular marketing emails - webinar invitations, newsletters, etc.

Home Office Readiness Phase

Internal Planning and Training

For home office use only

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Home Office Training, Collaboration & Preparation



Prepare for Communications, Demo, & Onboarding Training

Build the Buzz and Adoption
email series, two FMG webinars:
launch webinar and onboarding
training



The Buzz Phase

Creating Awareness

Build the Buzz Launch Communications



Launch Communications

Generate excitement, invite FPs to a product demo, webinar promotions + post-webinar follow-up, and next steps

Launch email from home office

Launch Email Copy (for B/D use) - Customize as needed

Subject line: Exciting news: We Have a New Marketing Platform!

We're excited to announce that you're getting a free subscription to **Launch MarketingSuite** starting on [date].

As your partner in success, [b/a] is committed to providing you with the tools and resources to grow your business. That's why we're thrilled to offer you [name of tool/program] - the ultimate all-in-one marketing platform powered by our award-winning partner, FMG. With [broker Dealer] [name of tool/program], you can easily connect with your customers and prospects and take your business to the next level.

On [date of activation], you'll receive access to your new, powerful tool via email, social, greeting card, and event tools, along with a vast content library and automations. You don't need to sign up, as we'll handle that for you.

FMG Tools Demo

30-minute Webinar
[date] at [time]
[Register here](#)

Get a preview of the new [name of bank] website, as well as [name of bank] robust content library, email, social, and event tools, automated campaign management, built-in compliance workflow, CRM integration, and more.

While you wait, check out this [FMG video](#) and [brochure](#) (link to the brochure upload and link) to learn more.

Communication templates for enterprise to customize and send

Onboarding Communications & Training - Build the Buzz



EXCLUSIVELY FOR Internal Teams at [ENTERPRISE].

This kit includes communication templates for the **Build the Buzz** phase of onboarding.

This document's email templates and webinar registration page templates cover the stage before launch. Your enterprise may use these templated communications and customize them as needed. NOTE: A separate document is available for the Adoption phase (launch and beyond).

Assumptions and Items to Be Decided:

- TOOL ACTIVATION
 - [NAME OF TOOL] will be provided to the FPs at no cost to the FP (aside from greeting card orders).
 - There will be no sign-up required for [NAME OF TOOL].
 - FMG will activate on the backend on a certain date (which ideally is on the same date or close to the date of webinar 2).
- WEBINARS
 - There are two webinars FMG will hold: demo and review of getting started.
 - Registration requirement needs to be decided. Communications are written as if registration is required.
 - Hosting by FMG or Enterprise needs to be decided.
 - Webinar 1:** Hold at least two weeks before the tool activation date.

Product Demo to Generate Excitement



Webinars

Introductory webinar, tool demo walkthrough, preview of each tool, webinar promotions, and registration template

Webinar Registration Page

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A preview exclusively for New York Community Bank

LPL MarketingSuite Tools Demo

May 22, 2023 | 10 am PT | 1 pm ET

LPL Marketing Suite Tools Demo with FMG

Spend 30 minutes with us to learn about FMG's marketing tools and how they can help you take your marketing to the next level. See what our vast content library has to offer and how our tools work for you: email, social, cards, event builder, and website – all in a modern, easy-to-use platform. We're excited to show you how FMG is a great solution to meet all of your marketing needs!

If you're unable to make it, no worries. Register and we'll send you the replay after the webinar.

First name* Last name*

Email*

Phone number*

Your personal information will be kept confidential according to our privacy policy.

[Continue Now](#)

Copyright 2023 FMG Bank, L.L.C. All Rights Reserved. Privacy policy | Contact us | Terms of use | About us

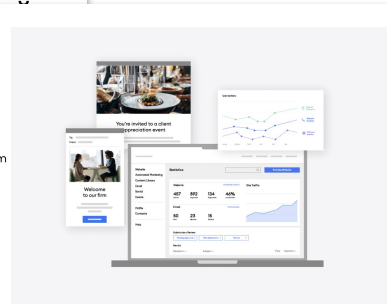
We have marketing and sales professionals who will be available for questions. We'll contact you if you're interested in a demo. We'll contact you if you're interested in a demo. We'll contact you if you're interested in a demo.

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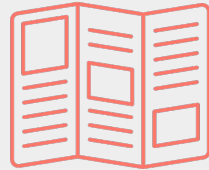
ABOUT FMG

All-In-One Marketing Suite

- Web, email, newsletters, social media, blogs, events, and greeting cards
- Multichannel and multi-medium content
- Set and Forget and AI content
- Built in compliance workflows
- Easy to use dashboard
- Reporting
- Personal branding

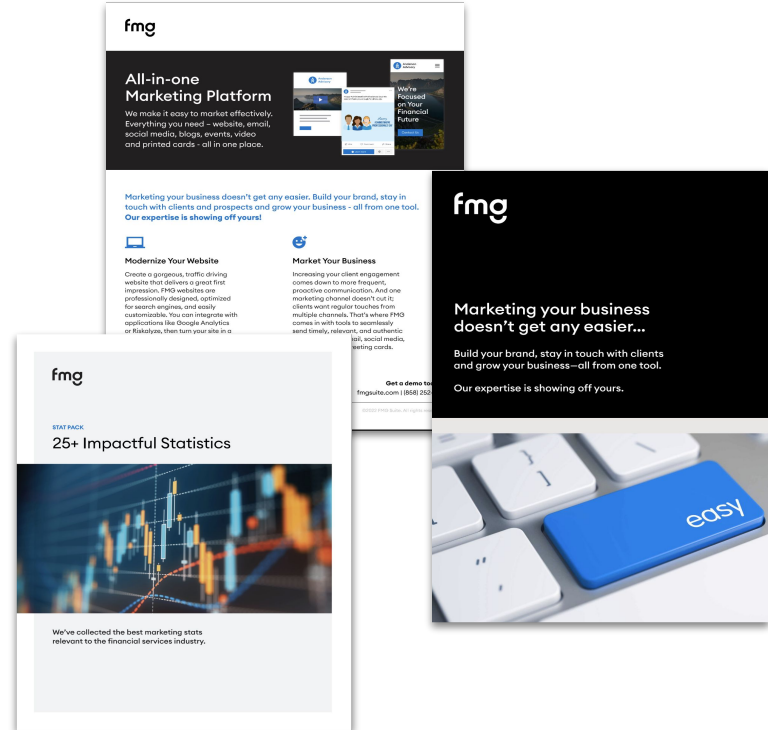


FMG Marketing Resources



Resources

Promo and product videos, FMG brochure and flyer, stat pack, FMG logo, and “about FMG” messaging for intranet



Adoption Phase

A simple journey from account activation
to setup and mastery

Onboarding and Adoption Email Series



Onboarding & Adoption Emails

Emails that invite advisors into the platform and show them how to make the most of their tools

Activation Email

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Your FMG Tools Are Ready!

You're now the owner of the very best digital marketing solution for financial advisors, powered by FMG Suite.

Getting Started Is Easy

The very first step is creating your username and password.

CREATE A USERNAME AND
PASSWORD

We're happy you are part of the FMG family and we look forward to working with you.

The FMG Team

Welcome Email

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Email drip series

fmg

[View in browser](#)

Are you tired of spending countless hours crafting email after email, trying to keep up with your marketing schedule?

Say goodbye to the headache and hello to effortless marketing with our pre-built email campaigns! Set it and forget it - our automations automatically trigger gorgeously designed emails, social posts, newsletters, birthday greetings, and more! And the best part?

You can plan your marketing for the entire year and beyond in just a few clicks. Head over to the Automated Marketing page in your MarketingSuite dashboard and explore the endless possibilities!

Here's [more information](#) on how you can get started with email automations. Need help? Give us a call at 858-251-2420.

Best,

FMG

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San Diego, CA 92128
United States

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Training to Support Adoption



Onboarding Training

Setup walkthrough,
how to start using your tools,
webinar promotions, and
registration template

fmg[View in browser](#)

If you attended our LPL MarketingSuite Tools Demo on May 22, we hope you enjoyed learning about this new marketing platform that you will soon have access to on June 5. For those who did not attend, here is the [webinar replay](#). Please watch it when you have time so that you are prepared and ready to get started on June 5.

Next Steps
Now that you have had a preview, it is time to get ready for what is to come! Sign up for our next webinar to learn how to get started with your new tools.

Getting Started with LPL MarketingSuite
Exclusively for New York Community Bank
Monday, June 5
10 am PT / 1 pm ET

[Save My Spot](#)

We'll review how to get your account ready to go, including creating your profile, adding your contacts, creating your email template, scheduling campaigns, sending content, and using your new email and social tools.

We look forward to bringing you the best of FMG Marketing

FMG
12395 World Trade Dr
San Diego, CA 92128
United States

You are receiving this email because you want to change how you receive content.

Copyright 2022 FMG Suite, LLC. We are protecting your data and CCPA suggests the following for you.

Marketing Suite Tools

[Website](#)[Blog](#)[Content Library](#)[Automated Marketing](#)[Email](#)[Social](#)[Events](#)[Profile](#)[Contacts](#)[Manage Contacts](#)[Manage Groups](#)[Emails](#)[Web](#)

Marketing Calendar **Inbox** **Drafts** **Compliance**

[Import & user](#)[Sync Retail CRM](#)[Sync Salesforce](#)[Sync Elixir SmartOffice](#)[Sync Wealthbox](#)[Sync MarketingPro](#)

Contacts [Add Contact](#) [Add to Group](#) [Groups](#)

☐ Name

☐ Email

☐ Email Status

☐ Groups

☐ Source

☐ Date Added

☐ Actions

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<input type="checkbox"/>	Lundberg, Elise	elise.kendrieger@gmail.com	Subscribe	2 Groups	Website Event	02/09/2023	Actions
<input type="checkbox"/>	Sandmark, Ryan	ryan.sandmark@fmg.com	Subscribe	1 Group	Manual Add	05/10/2022	Actions
<input type="checkbox"/>	Lundgren, Sean	sean.lundgren@fmg.com	Subscribe	1 Group	Manual Add	05/10/2022	Actions

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Adoption Support with Helpful Resources



Product Tour & Onboarding Resources

Getting started checklist, walkthrough video, and knowledge center

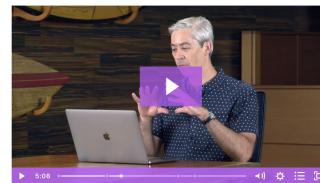


Product Tour

Getting Started: A Suite Starting Place

If you do one thing before diving in to your new site, watch this video!

fmg Written by FMG, Updated over a week ago



- Ready to learn more about making some basic website edits? [Review the basics](#)
- Got the basics covered? [Take a deeper dive into your FMG tools](#)
- Ready for your debut? [Learn more about the Go Live Process](#)

Knowledge Center



Advice and answers from the FMG Team

Search for articles...



Getting Started

Everything you need to know to get started with FMG

fmg 1 author • 3 articles



The Basics

Everything you need to know to get your website off the ground

fmg 2 authors • 30 articles



Content Library

Browsing, using and sending content from the FMG Content Library

fmg 2 authors • 21 articles

Checklist



Get the Most Out of Your Account

11%

Build a Strong Foundation for Your Brand

- ☐ **Verify your profile and contact info.**
Verifying your information will ensure your clients and prospects have access to your contact information on your landing page.
[View this step >](#)
- ☐ **Upload your portrait.**
Uploading a professional photo will help clients and prospects identify you even more easily when reaching communications or visiting your landing page.
[View this step >](#)
- ☐ **Double-check your disclosure.**
Verifying your disclosure is correct keeps you compliant and reinforces your credibility.
[View this step >](#)

Consolidate Your Communications

- ☐ **Upload your contacts.**
Completing this step will allow you to send emails and stay in touch with your clients.
[View this step >](#)
- ☐ **Connect all of your social media accounts.***
Connecting your accounts will allow you to easily share our content online.
[View this step >](#)
- ☐ **Customize your email template with your branding and logo.***
This step will strengthen your brand and keep you top of mind with every email.
[View this step >](#)

Connect With Award-Winning Content

- ☐ **Activate your campaigns.**
Maximize client engagement with your new automated campaigns.
[View this step >](#)
- ☐ **Select 6 to 10 of your favorite pieces from the content library.**
Browse the content pieces you'll send to your clients next often.
[View this step >](#)
- ☐ **Select your favorite prewritten emails from the library.**
Prewritten emails (and custom email templates) can save you a ton of time.
[View this step >](#)

Ongoing Support Phase

Turning customers into super users and raving fans

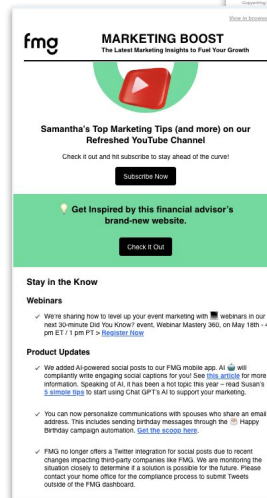
Value-Add Resources



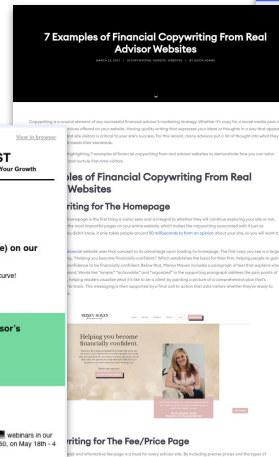
Value-Add Touchpoints

Case studies, blogs, In-app messaging, email updates to promote upcoming webinars, share information on new products and enhancements, and more

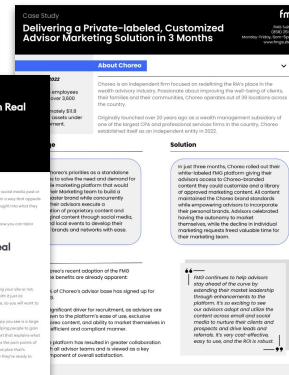
Marketing Newsletter



Blogs



Case Study



Webinars and Videos to Drive Engagement

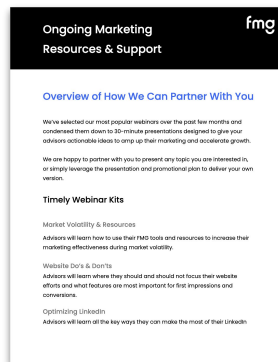


Webinars to Engage

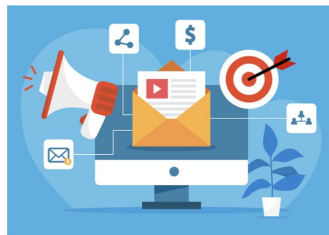
Ongoing education to master your tools and thought leadership webinars



Exclusive Webinars and Master Class for your B/D



Thought Leadership Webinars



Will You Retain Or Lose Clients Based On Your Communication Approach?

FMG YouTube Channel



Did You Know? Webinars



Thanks!