

Adoption Launch

Communications & Training

EXCLUSIVELY for internal Teams at [ENTERPRISE*].

**The term "enterprise" is used throughout and refers to any firm onboarding with FMG.*

About this Communication Kit

This kit provides enterprises onboarding to FMG with pre-made templates to help during the "**Adoption**" phase. This phase refers to the period following the launch, during which your enterprise and FMG will work on getting users to embrace and effectively use their new marketing tools.

Here's how to use this document:

1. **Email Templates:** The emails drafted below are templated communications you can send to your financial professionals. You can customize them to fit your organization's specific needs and branding. FMG can also send the communications on your behalf, so please ensure you communicate with your FMG marketing contact to decide the next steps. Download a Word document of the templated communications below.



2. **Customization:** It's important to note that these templates are not one-size-fits-all. It would be best if you tailored them to your specific enterprise needs, including adjusting the messaging, branding elements, and other details to align with your

company's unique style and objectives.

3. For Post-Launch Communications: This document is for the day of, and the day after, the technology launches and is not intended for pre-launch “build the buzz” communications.

Items to Be Decided

Decisions may impact the templated communications below. Please be sure to revise the communications accordingly.

Communications

- The communications below are available for your enterprise to customize if your enterprise plans to send as a complimentary component to FMG's regular adoption and value-added emails.

Webinars

- Decide on exclusive webinars you'd like to hold, in partnership with FMG, to help with learning and maximizing FMG's tools and features and whether FMG or the enterprise will manage the hosting and promotions of any upcoming enterprise-specific webinars.

FMG Communications and Training to Customers

- After onboarding, customers will receive value-added communications from FMG. These communications may include monthly e-newsletters with adoption tips, news, and product updates. Customers can expect periodic emails with updates on their tools, features, and capabilities. For details, [click here](#).
- FMG will offer training opportunities to help customers maximize the use of their tool.

Communications Timeline

FMG Onboarding Emails

FMG automatically triggers FMG-authored emails once the account is activated to help with tool access and setup.

[Examples of operational/welcome emails sent by FMG](#)

Enterprise or Broker/Dealer Communications

Based on decisions with timing, the communications timeline below and messaging are subject to change. Your enterprise can take these communications and customize them to fit their needs.

Title and link	Date	Sender
Webinar 2 – Getting Started with Your Tools	[~ launch day]	FMG, Enterprise or Broker/Dealer
Adoption Email 1 – Webinar 2 Follow-Up	[day of – 2 days after webinar 2]	Enterprise or Broker/Dealer
Best practices Communications Sent by the Enterprise (Optional) <i>The content below can be used and adjusted to fit the home office's needs – some examples of how you can use the content include a newsletter story, email, and blog.</i>		
Adoption Communication 2 – Training and Resources	Week 2	Enterprise or Broker/Dealer
Adoption Communication 3 – Email Best Practices	Month 2	Enterprise or Broker/Dealer
Adoption Communication 4 – Social Media Best Practices	Month 3	Enterprise or Broker/Dealer

Adoption Communication 5 - Surprise and Delight Best Practices	Month 4	Enterprise or Broker/Dealer
Adoption Communication 6 - Event Marketing Best Practices	Month 5	Enterprise or Broker/Dealer

Adoption Communications (Templates you can use for email, newsletters, blogs, etc.)

- Tool Activation Day

Adoption Email 1 - Webinar 2 Follow-Up

From: [ENTERPRISE]

To: Marketing subscriber

Send: ~ day of - 2 days after webinar 2

Subject: Webinar Replay + Resources: [Webinar name]

[Name],

We would like to thank everyone who attended yesterday's [WEBINAR 2 TITLE] webinar. If you missed it or would like to rewatch it, you can access the [webinar replay](#) - [WEBINAR REPLAY TO WEBINAR 2]. This webinar contains all the essential information to set yourself up for success in the platform and effectively utilize your marketing tools. For your convenience, we've shared these resources with you once more:

- [Checklist](#): A step-by-step guide to help you get started.
- [Video Walkthrough](#): See how your tools work together in action.

If you ever need assistance with your new [NAME OF TOOL], please don't hesitate to contact FMG at [858-251-2420](tel:858-251-2420) or [schedule an FMG onboarding training session](#).

We hope you enjoy using your new marketing tools!

[B/D Signature/Program Signature]

ADOPTION EMAIL 1 – Getting Started with Your Marketing Tools
(automatically sent to subscribers right after the activation email is sent)

[This copy is already queued to send to new Marketing Tool subscribers]

- Week 2 after launch

ADOPTION COMMUNICATION 2 – Check out our Marketing Resources Collection

From: [ENTERPRISE]

To: Marketing subscriber

Material type: Newsletter story, email, blog – any way your enterprise would like to use this content

Send: Week 2 after the activation

Subject: [Tool Name] Support and Resources for You

[Name],

As you are aware, [TOOL NAME] became available on [DATE OF LAUNCH]. Whether you signed up or not, we are so excited to offer the tools and everything for you to succeed. Here are some resources that will be valuable as you acclimate to your new FMG tools:

- **FMG Knowledge Base:** Includes how-to articles located in your [Tool Name] portal under Help > Knowledge Base. It's your go-to resource for answers and

guidance.

- **[FMG Marketing YouTube Page](#)**: Explore FMG's thought leadership webinars and a customer fan-favorite, FMG's "Did You Know" webinars. The videos and webinars will show how to be the most strategic with your marketing and how to fully leverage your FMG features and content.
- **[FMG Blog Page](#)**: FMG's blog page is filled with fresh and timely marketing insights you won't want to miss.
- **[FMG Mobile App](#)**: Download the FMG app to manage marketing on the go. It lets you stay current with new email content added to your library. Find it as "FMG - Expert Advisor Marketing" in the [Apple App Store](#) or [Google Play](#).

If you're signed up for [TOOL NAME], watch for helpful emails from FMG. These include webinar invites, marketing tips, and best practices for using your FMG tools. If you have any questions related to your new tools, FMG is ready to help and can be reached at [858-251-2420](tel:858-251-2420). You can also [schedule](#) an FMG onboarding training to enhance your proficiency.

Best regards,

[B/D Name & FMG]

- Month 2 after launch

ADOPTION COMMUNICATION 3 - Email Best Practices

From: [ENTERPRISE]


To: Marketing subscriber

Material type: Newsletter story, email, blog - any way your enterprise would like to use this content

Send: Month 2 after account activation

Subject: Accelerate your success with these email best practices

Hi [name],

For those who signed up for [Tool Name – link over to FMG microsite in title], we're thrilled to see you on the path to elevating your marketing game! Whether you signed up or not, we want to shine a spotlight on your email tool , an essential part of your toolkit that simplifies sending and customizing emails. Coupled with our content library, it empowers you to create engaging and personalized email campaigns.

Here are some quick email marketing best practices to help you kickstart your journey:

- **Customize Your Email Template:** Make your emails stand out by adding your photo, company logo, and brand colors.
- **Personalization and Engagement:** Craft personalized, concise, and visually stimulating emails. Consider incorporating videos for that extra attention-grabbing touch.
- **Timely and Relevant Content:** Send content that resonates with your audience at the right time to achieve the best open rates.
- **Segment Your Email Lists:** Divide your email lists based on demographics and interests. Tailor your messaging to each segment to maximize engagement.
- **Testing and Consistency:** Experiment with different days and times to find the best schedule for your contacts. Aim to email your clients at least twice a month.
- **Marketing Automations and Email Sequences:** Save time and boost efficiency using FMG's Marketing Automations and Email Sequences.

Resources & Support:

For a deeper dive into email marketing best practices, check out this FMG [article](#) that provides additional insights. To implement these tips in [Tool Name], you can find a range of [how-to articles](#) in FMG's Knowledge Base. Contact FMG if you have any questions about [Tool Name] at [858-251-2420](tel:858-251-2420). You can also [schedule](#) an FMG onboarding training to enhance your proficiency.

- Month 3 after launch

ADOPTION COMMUNICATION 4 - Social Media Best Practices

From: [ENTERPRISE]

To: Marketing subscriber

Material type: Newsletter story, email, blog – any way your enterprise would like to use this content

Send: Month 3 after account activation

Subject: Get Ready to Supercharge Your Social Media Marketing Skills!

[Name],

If you've already signed up for [Tool Name], we hope you're enjoying your new marketing tools and had a chance to try out our email tips over the last few weeks. Whether you've already subscribed to [Tool Name - link over to FMG microsite in title] or are still considering, we'd like to take a moment to dive into the exciting realm of social media marketing!

We understand that social media can sometimes feel like a puzzle, but don't worry – we've got your back. FMG is here to make posting on various platforms a breeze, and our content library is your go-to resource for sparking meaningful interactions.

Here's a quick rundown of social media best practices to kickstart your journey:

- **Define Your Target Audience:** Group your contacts and tailor your content to meet their needs and interests.
- **Choose the Right Platforms:** LinkedIn is the platform most favored by advisors, and it's excellent for connecting with business professionals and niche markets. Facebook is ideal for engaging with baby boomers and Gen X.
- **Engage with Your Audience:** Build relationships, ask questions, and share valuable insights. It's all about fostering interaction.
- **Stay Timely:** Share breaking news and timely content. [FMG's mobile app](#) will help you stay in the loop, ensuring you're always on top of current events.
- **Design Eye-Catching Posts:** Utilize Canva, seamlessly integrated into your FMG portal, to create visually appealing and attention-grabbing posts.
- **Master Hashtags and Tagging:** # Use hashtags and tagging to extend the reach of your hard work and get your content in front of a broader audience.
- **Track Your Success:** Leverage analytics tools to understand what works best for your specific audience. Make adjustments and refine your strategy accordingly.

Resources & Support:

If you're eager to explore social media best practices further, check out FMG's in-depth [article](#) that delves into the topic. You can also access a collection of [social media how-to articles](#) in FMG's Knowledge Base. Contact FMG if you have any questions about [Tool Name] at [858-251-2420](tel:858-251-2420). You can also [schedule](#) an FMG onboarding training to enhance your proficiency.

We're excited to witness the fantastic ways you'll leverage social media to amplify your marketing efforts.

- Month 4 after launch

ADOPTION COMMUNICATION 5 – Client Surprise and Delight Best Practices

From: [ENTERPRISE]

To: Marketing subscriber

Material type: Newsletter story, email, blog – any way your enterprise would like to use this content

Send: Month 4 after account activation

Subject: Elevate Client Relationships with Surprise and Delight Strategies

[Name],

Would you like to take your client relationships to new heights with surprise and delight tactics? [Tool Name] offers great solutions to help you do just that. Whether you've subscribed to [Tool Name], or are still considering, these tactics will enable you to create unforgettable moments and truly wow your clients:

- **Personalized Outreach:** Sync your CRM to forge deeper connections by personalizing customer experiences. Create client groups based on their interests, hobbies, investing stage, life stage, and more.
- **Consistent Communication:** Turn on your marketing automations. Stay connected with your clients through regularly targeted messages. Aim to engage with them at least twice a month, maintaining a consistent line of communication.
- **Market Insights:** Proactively share market insights to make your clients feel secure and valued. In uncertain times, they appreciate hearing from you more than ever.
- **Entertaining Events:** Host engaging events tailored to your clients' interests. These events are a great way to show appreciation and strengthen your relationships.

- **Thoughtful Messages:** Stand out by sending thoughtful messages, whether through printed cards for special occasions, birthday e-cards, or holiday emails.

Resources & Support:

We've written an article on [Surprise and Delight Tactics](#) for more in-depth information. To put these tips into action, visit our [FMG Knowledge Base](#). Contact FMG if you have any questions about [Tool Name] at [858-251-2420](#). You can also [schedule](#) an FMG onboarding training to enhance your proficiency.

ADOPTION COMMUNICATION 6 – Event Marketing Best Practices

- Month 5 after launch

From: [ENTERPRISE]

To: Marketing subscriber

Material type: Newsletter story, email, blog – any way your enterprise would like to use this content

Send: Month 5 after account activation

Subject: Let's Prepare You to Host Your Next Outstanding Event!

[Name],

Whether in person or digital, hosting events is a powerful marketing strategy that enables you to connect with clients and prospects, enhancing your brand's visibility. With [Tool Name] tools, planning and executing successful events becomes a breeze. We offer exceptional event marketing tools, innovative ideas, and engaging content to help you shine.

Here are some key strategies to ensure your event is memorable and impactful:

- **Define Your Event Goals:** Start by jotting down your objectives, allowing your creativity to flow freely.

- **Create an Unforgettable Theme:** Inject excitement into your event with a unique and captivating theme.
- **Stay Organized:** Keep your event on track using a timeline or event planning app, or refer to our checklist guides for a seamless planning experience.
- **Engage Your Attendees:** Make your event interactive by including activities, games, and networking opportunities to keep participants engaged and excited.
- **Follow-up:** Express your appreciation by sending personalized thank-you notes and sharing relevant resources discussed during the event.

Resources & Support:

For a deeper dive into event planning best practices, we've prepared an informative [article](#) that provides additional insights. To implement these tips, explore our collection of [how-to articles](#) on event planning. If you ever require assistance or have questions, don't hesitate to reach out to FMG at [858-251-2420](#). You can also [schedule an FMG onboarding training session](#) to enhance your event planning skills.
