

Build the Buzz 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 you during the "**Build the Buzz**" phase. This phase is all about generating excitement and preparing your financial professionals for what's coming – an all-in-one marketing platform that's a scalable, effective, and efficient solution to help financial professionals connect with clients and grow their book of business.

This document is a valuable resource to streamline your communication efforts. It is meant to be a starting point that you can customize to make it uniquely your own.

Here's how to use this document:

1. **Email Templates:** The emails drafted below are templated communications you can use and send to your financial professionals. They may include introductory messages, teasers, and information about what's coming. We encourage you to customize them to fit your organization's specific needs and branding. Download a Word document of the templated communications below.



2. **Webinar Registration Page Templates:** When planning a webinar as part of your pre-launch communication strategy, these templates provide a starting point for creating registration pages. You can modify them to include relevant details, such as the date, time, agenda, and registration form.

3. **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.

4. **For Pre-Launch Communications:** This document is for the weeks leading up to the technology launch and is not intended for post-launch "adoption" communications.

Items to Be Decided

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

Tool Activation

- The communications below include variations for self-sign-up and batch activation. Please be sure to use the correct version based on how your reps will gain access to the FMG platform, and adjust to fit your needs.

Webinars

- We suggest holding at least two webinars: one for a demo and the other for a review of getting started with the tool.
 - We recommend holding the first webinar at least two weeks before the tool activation date.
 - The second webinar, which is for the review of getting started with the tool, is recommended to be held on the same day as the tool activation date or soon after.

- FMG can facilitate hosting the webinar if desired.
- The enterprise will need to decide the registration requirements for these webinars.
 - The communications are written as if registration is required. Be sure to tailor the communications based on your decision.

Communication Summary

Here are some clear guidelines for communication with enterprise reps as part of the Build the Buzz process and a summary of the key points:

Launch Communications

Your enterprise or broker/dealer will send all launch communications.

Communications likely include announcements and information regarding the tool's availability, how to access and its benefits.

Webinar Registration Confirmations and Reminders (If FMG Hosts)

If FMG hosts the webinars, registration confirmations, and reminders will be sent automatically from Zoom. This ensures that registered attendees receive timely updates and reminders about the webinars.

Communications Timeline

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

Title and link	Date	Sender
ENT - Email 1 - Initial Reach Out with Webinar 1 invitation <i>2 versions are available - version a: self-sign-up or version b: batch activation</i>	[2 weeks before webinar 1]	Enterprise or Broker/Dealer
ENT - Email 2 - Webinar 1 Reminder 1 <i>2 versions are available - version a: self-sign-up or version b: batch activation</i>	[1 week before webinar 1]	Enterprise or Broker/Dealer
ENT - Email 3 - Webinar 1 Reminder 2	[Day before webinar 1]	Enterprise or Broker/Dealer
Webinar 1 - FMG Demo	[2 weeks before launch date]	FMG, Enterprise or Broker/Dealer
ENT - Email 4 - Webinar 1 Follow Up w/ Webinar 2 Invite	[1-3 days after 1st webinar]	Enterprise or Broker/Dealer
ENT - Email 5 - Webinar 2 Reminder <i>2 versions are available - version a: self-sign-up or version b: batch activation</i>	[Day before the webinar]	Enterprise or Broker/Dealer

Email (Templates)

- Before Webinar 1

ENT – Email 1a – Initial Reach Out with Webinar 1 Invitation (self sign-up)

From: [ENTERPRISE]

To: Financial professionals (and advisor support members) at [ENTERPRISE]

Send: ~ 2 weeks before webinar 1

Subject line: Introducing our New Marketing Solution, [TOOL NAME]!

[Name],

New all-in-one marketing tool launches [DATE OF LAUNCH] – sign up now!

As your partner in success, [ENTERPRISE] is committed to providing you with the best tools and resources to grow your business. That's why we're thrilled to offer you [NAME OF TOOL] – the ultimate all-in-one marketing platform powered by our award-winning partner, FMG. With [NAME OF TOOL], you can easily connect with your customers and prospects and take your business to the next level.

Starting on [DATE OF LAUNCH], those who subscribe will gain access to your new, powerful tools: email, social, greeting card, and event management for just [PRICING DETAILS]. Additionally, you'll have access to an extensive content library [IF THE PACKAGE INCLUDES AUTOMATIONS, “and automation capabilities”] to streamline your communications and operations.

To help you get acquainted with FMG Tools, we invite you to join our upcoming 30-minute webinar. During this session, you'll get a sneak peek at how the tools will work.

FMG Tools Demo Webinar

[DATE OF WEBINAR 1] at [TIME OF WEBINAR 1]

[Register Here](#) [WEBINAR 1 REGISTRATION LINK]

Please take a moment to watch this informative [FMG video](#) and [visit this page](#) [link to your b/d microsite] if you'd like to learn more.

We can't wait to unveil these fantastic tools!

[B/D Signature/Program Signature]

Use the version below instead if FMG is performing batch activation:

ENT - Email 1b - Initial Reach Out with Webinar 1 Invitation (batch activation)

From: [ENTERPRISE]

To: Financial professionals (and advisor support members) at [ENTERPRISE]

Send: ~ 2 weeks before webinar 1

Subject line: Introducing our New Marketing Solution, [TOOL NAME]!

[Name],

We're excited to announce that you're getting a free subscription to [NAME OF TOOL] starting on [DATE OF TOOL ACTIVATION]!

As your partner in success, [ENTERPRISE] is committed to providing you with the best tools and resources to grow your business. That's why we're thrilled to offer you [NAME OF TOOL] – the ultimate all-in-one marketing platform powered by our award-winning partner, FMG. With [NAME OF TOOL], you can easily connect with your customers and prospects and take your business to the next level.

Starting on [DATE OF TOOL ACTIVATION], you will gain access to your new, powerful tools: email, social, greeting card, and event management. Additionally, you'll have

access to an extensive content library [IF THE PACKAGE INCLUDES AUTOMATIONS, “and automation capabilities”] to streamline your communications and operations.

To help you get acquainted with FMG Tools, we invite you to join our upcoming 30-minute webinar. During this session, you'll get a sneak peek at how the tools will work.

FMG Tools Demo Webinar

[DATE OF WEBINAR 1] at [TIME OF WEBINAR 1]

Register Here [WEBINAR 1 REGISTRATION LINK]

Please take a moment to watch this informative **FMG video** and **visit this page** [link to your b/d microsite] if you'd like to learn more.

We can't wait to unveil these fantastic tools!

[B/D Signature/Program Signature]

ENT - Email 2a - Webinar 1 Reminder (1 week before)

From: [ENTERPRISE]

To: NON-REGISTRANTS > Financial professionals (and advisor support members) at [ENTERPRISE]

Send: 1 week before the webinar.

Subject: Reminder: Register for Upcoming [NAME OF TOOL] Webinar

[Name],

We are reminding you of an exciting opportunity for all [ENTERPRISE] financial professionals. As previously shared with you [when], we are thrilled to announce the launch of [ENTERPRISE][NAME OF TOOL] powered by FMG, an award-winning marketing technology and content provider. For more information, click here [ADD

DETAILS ON PRICING AND WHERE TO SIGN UP / link to FMG microsite.].

To help you make the most of this resource, we invite you to join our upcoming webinar, where you can learn about [NAME OF TOOL] and unlock the full potential of your marketing tools, and the full suite of tools will be available starting on [DATE OF LAUNCH] to those who subscribe.

Here are the details for the webinar:

FMG Tools Demo

30-minute webinar

[DATE OF WEBINAR 1] at [TIME OF WEBINAR 1]

[Register Here](#) [WEBINAR 1 REGISTRATION LINK]

If you cannot attend the live webinar, we'll send you a replay.

During this webinar, you'll get a preview of the new [ENTERPRISE] website and explore the robust [ENTERPRISE][NAME OF TOOL] tools and content. These include:

- **Email:** Quickly build, manage, and send your email messages or choose from the content library.
- **Social Media:** Expand your reach and establish yourself as a thought leader.
- **Content:** Access professionally written, compliance-friendly, on-demand, and automated content.
- **Compliance Workflow:** Seamless compliance integration to operate more efficiently.
- ... and much, much more!

In today's fast-paced digital landscape, clients and prospects seek financial guidance and advice more than ever. Stay connected and build trust through effective marketing – take advantage of this fantastic opportunity!

Thank you for your continued partnership with [ENTERPRISE]. We look forward to seeing you at the webinar and helping you harness the power of [NAME OF TOOL]!

[B/D Signature/Program Signature]

Use the version below instead if FMG is performing batch activation:

ENT – Email 2b – Webinar 1 Reminder (1 week before) (batch activation)

[Name],

We are reminding you of an exciting opportunity for all [ENTERPRISE] financial professionals. As previously shared with you [when], we are thrilled to provide you with a complimentary [ENTERPRISE][NAME OF TOOL] account powered by FMG, an award-winning marketing technology and content provider. [ADD DETAILS ON PRICING / OR REFERENCE FREE TOOL, IF PAID FOR BY THE ENTERPRISE.]

To help you make the most of this resource, we invite you to join our upcoming webinar, where you can learn about [NAME OF TOOL] and unlock the full potential of your marketing tools, which will be available to you on [DATE OF ACTIVATION].

Here are the details for the webinar:

FMG Tools Demo

30-minute webinar

[DATE OF WEBINAR 1] at [TIME OF WEBINAR 1]

Register Here [WEBINAR 1 REGISTRATION LINK]

If you cannot attend the live webinar, we'll send you a replay.

During this webinar, you'll get a preview of the new [ENTERPRISE] website and explore the robust [ENTERPRISE][NAME OF TOOL] tools and content. These include:

- **Email:** Quickly build, manage, and send your email messages or choose from the content library.
- **Social Media:** Expand your reach and establish yourself as a thought leader.
- **Content:** Access professionally written, compliance-friendly, on-demand, and automated content.

- **Compliance Workflow:** Seamless compliance integration to operate more efficiently.
- ... and much, much more!

In today's fast-paced digital landscape, clients and prospects seek financial guidance and advice more than ever. Stay connected and build trust through effective marketing – take advantage of this fantastic opportunity!

Thank you for your continued partnership with [ENTERPRISE]. We look forward to seeing you at the webinar and helping you harness the power of [NAME OF TOOL]!

[B/D Signature/Program Signature]

ENT - Email 3 - Webinar 1 Reminder (1 day before)

From: [ENTERPRISE]

To: Financial professionals at [ENTERPRISE]

Send date: [Day before webinar 1]

Subject line: Please Register: [Name of Tool] Demo is Tomorrow!

Robust Marketing Tools for [ENTERPRISE] Financial Professionals all on ONE platform!

Are you looking for all-in-one marketing tools designed for [ENTERPRISE] financial professionals? Your search ends here!

During a live webinar tomorrow, FMG, our trusted [NAME OF TOOL] partner, will unveil their groundbreaking all-in-one marketing platform. Please register for tomorrow's webinar to learn more about this fantastic opportunity.

FMG Tools Demo

30-minute webinar

[DATE OF WEBINAR 1] at [TIME OF WEBINAR 1]

[Register Here](#) [WEBINAR 1 REGISTRATION LINK]

We will provide a replay link to those who cannot attend live.

[NAME OF TOOL] has been meticulously crafted with you in mind, offering the tools, content, and guidance you need to supercharge your marketing efforts. Here is a glimpse of what's available to you:

- Email and social tools to keep you top of mind with clients and prospects.
- Automated campaigns ensure your marketing engine runs 24/7.
- Compliance-friendly content, including videos, articles, greeting cards, and more.
- An intuitive platform to streamline event marketing promotion and management.

Don't miss this incredible opportunity to send meaningful, relevant communications and forge stronger connections with your clients and prospects. Secure your spot now by registering here: [WEBINAR 1 REGISTRATION LINK].

[B/D Signature/Program Signature]

- Before Webinar 2

ENT - Email 4 - Webinar 1 Follow Up w/ Webinar 2 Invite

From: [ENTERPRISE]

Send date: [1-3 days after 1st webinar]

To: Financial professionals at [ENTERPRISE]

Subject line: [NAME OF TOOL] - Replay and Next Webinar

[Name],

We hope you enjoyed the insightful demonstration on [NAME OF WEBINAR 1], where we unveiled the exciting new marketing platform, [NAME OF TOOL], that will soon

become available to those who subscribe on [DATE OF LAUNCH]. Those who could not attend the live event, catch up by watching the webinar replay [right here - \[WEBINAR REPLAY TO WEBINAR 1\]](#).

Now that you've had a sneak peek, it's time to prepare for the exciting journey ahead. The next crucial step is to register for our upcoming webinar with FMG, where you will learn how to utilize and maximize your powerful marketing tools.

Getting Started with [Name of Tool]

1-Hour Webinar

[DATE OF WEBINAR 2] at [TIME OF WEBINAR 2]

[Register Here](#) [WEBINAR 2 REGISTRATION LINK]

During this webinar, FMG will guide you through setting up your account, including creating your profile, adding contacts, crafting email templates, scheduling campaigns, sharing content, and harnessing the potential of your new marketing tools.

We're eager to bring this remarkable marketing tool to you very soon!

See you at the next webinar!

[B/D Signature/Program Signature]

- Preparing for Tool Activation

ENT - Email 5a - Webinar 2 Reminder

From: [ENTERPRISE]

To: Financial professionals at [ENTERPRISE]

Send: [day before webinar and account activation]

Subject: Learn how to get started with [Tool Name]

[Name],

To ensure you are fully prepared to use your new [Tool Name] marketing tools, please register for tomorrow's webinar. *A replay will be sent to you if you cannot attend.*

FMG Webinar: Getting Started with [Name of Tool]

1-Hour Webinar

[DATE OF WEBINAR 2] at [TIME OF WEBINAR 2]

[Register Here](#) [WEBINAR 2 REGISTRATION LINK]

In this webinar, FMG will guide you on how to prepare your account for optimal use. You'll learn how to create your profile, add contacts, set up email templates, schedule campaigns, send content, and make the most of your new email and social tools.

As a reminder of what we covered in the last webinar, you can find more information on [TOOL NAME] and pricing here:

[More information - link to your FMG microsite]

Once you've signed up, you can look out for emails from FMG containing your login credentials and a welcome email with valuable resources, such as checklists and articles, to assist you in setting up your account.

Thank you for taking the time to register [link to webinar registration page]. We're looking forward to delivering this fantastic marketing platform to you soon.

See you at the next webinar!

[B/D Signature/Program Signature]

Use the version below instead if FMG is performing batch activation:

ENT - Email 5b - Webinar 2 Reminder (batch activation)

[Name],



We're excited to announce that we'll activate your [NAME OF TOOL] account tomorrow. But before we start, you must register for tomorrow's webinar. Please take a moment to complete your webinar registration. *A replay will be sent to you if you cannot attend.*

FMG Webinar: Getting Started with [Name of Tool]

1-Hour Webinar

[DATE OF WEBINAR 2] at [TIME OF WEBINAR 2]

Register Here [WEBINAR 2 REGISTRATION LINK]

In this webinar, FMG will guide you on how to prepare your account for optimal use. You'll learn how to create your profile, add contacts, set up email templates, schedule campaigns, send content, and make the most of your new email and social tools.

As a reminder of what we covered in the last webinar, there is no need to sign up for [TOOL NAME] – we'll take care of that for you, but we do ask that you join us for this important webinar. Then, on [TOOL NAME][DATE OF TOOL ACTIVATION], you can look out for emails from FMG containing your login credentials and a welcome email with valuable resources, such as checklists and articles, to assist you in setting up your account.

Thank you for taking the time to register. We're looking forward to delivering this fantastic marketing platform to you soon.

See you at the next webinar!

[B/D Signature/Program Signature]

Landing Page (Templates)

[webinar registration pages are written as if managed/hosted/presented by FMG – please edit as needed if you do not plan to have FMG manage]

- Webinar 1

Webinar registration page – webinar 1 (demo)

A preview exclusively for [ENTERPRISE]

[ENTERPRISE] and [NAME OF TOOL]

Tools Demo

[DATE OF WEBINAR 1] at [TIME OF WEBINAR 1]

[Register Here](#) [WEBINAR 1 REGISTRATION LINK]

[NAME OF TOOL] Demo with FMG

We invite you to spend 30 minutes with us and discover how FMG's cutting-edge marketing tools can take your marketing to the next level. In this session, you'll learn about the capabilities of our platform and how it can empower your marketing efforts.

- Explore our vast content library and the valuable resources it offers.
- Gain insights into how our tools work for you, including email marketing, social media management, cards, and an event builder – all within a modern and user-friendly platform.

We're excited to demonstrate how FMG can be your all-in-one solution to meet your marketing needs effectively.

Registration Form is linked with FMG Zoom account:

[First Name, Last Name, Email, Phone]

If you cannot attend live, a replay will be emailed to you after the event.

- Webinar 2

Webinar registration page - webinar 2 (Getting Started)

Exclusively for [ENTERPRISE]

[NAME OF TOOL] Demo

[DATE OF WEBINAR 2] at [TIME OF WEBINAR 2]

[Register Here](#) [WEBINAR 2 REGISTRATION LINK]

This webinar will go over everything you need to know regarding account setup for your new [Tool Name] marketing tools. We'll show you how to complete your profile, build your email template, and add your contacts and segments. We'll also show you how to use your email, social and event tools, set up automations, and much more!

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

Registration Form is linked with FMG Zoom account:

[First Name, Last Name, Email, Phone]

If you cannot attend live, a replay will be emailed to you after the event.
