

AGENCY OVERVIEW

We are honored to explore partnership opportunities with you. Enclosed you will find a working document describing our process, capabilities and a glimpse into what to expect.

OUR PROCESS



PLANNING PHASE

DISCOVERY + BRAND AUDIT

During our discovery calls, we will use targeted questionnaires to uncover your mission, value proposition, messaging and key differentiators.

The second phase of discovery includes a brand audit. This thorough examination explores your current marketing materials, processes and client experience to identify strengths, weaknesses and opportunities.



PLANNING PHASE

STRATEGY + TACTICAL PLAN

The information shared during our discovery calls paired with data gathered from our internal research will build the foundation of your marketing strategy.

Marketing Strategy

Tactical Plan



IMPLEMENTATION PHASE

BRAND IDENTITY

Your mission and values should be reflected in your brand through the psychology of color, font, imagery and messaging.

Brand Guidelines



IMPLEMENTATION PHASE

CONTENT DEVELOPMENT

An action plan is only good when executed. Our team of professional graphic designers, compliance officers, writers and marketers have the skills and expertise to bring your strategy to life! Throughout our engagement, you will work with a dedicated 401(k) brand specialist to develop your project deliverables and implement your custom marketing strategy.

Traditional Marketing

Content Marketing

Digital Marketing



EVALUATION PHASE

MONITORING + REPORTING

Marketing is an ongoing journey that evolves over time. That is why we regularly review and assess marketing initiatives to track success.

Success Metrics

PHASE EXPECTATIONS

PLANNING PHASE

Marketing Strategy

- + Goals analysis
- + Marketplace analysis
- + Competitive analysis
- + Keyword research
- + 3 custom branding strategies

Tactical Plan

- + Marketing committee assembly
- + 12-month marketing plan

IMPLEMENTATION PHASE

Brand Guidelines

- + Logo
- + Color palette
- + Typography selection
- + Imagery portfolio
- + Brand messaging overview

BUILDING YOUR UNIQUE marketing strategy

During a custom agency engagement, we strive to become an extension of your firm. The planning phase is a 5 to 6 week process that allows us to uncover your mission, identify your business goals and execute a strategy for success.

- Weekly focus calls
- Professional coordination
- Concierge support

WEEK 1

Discovery call 1
+ brand audit

WEEK 2

Discovery call 2
+ brand audit



EVALUATION PHASE

Traditional Marketing

- + Company brochure
- + Website
- + Business cards
- + Pitch deck
- + Executive overview
- + Fact finder
- + Service calendar
- + RFP templates
- + Benchmarking reports
- + Investment analysis reports
- + Enrollment materials

Content Marketing

- + Newsletters
- + Seminars
- + Webinars
- + Blog articles
- + Videos
- + Infographics
- + Podcasts
- + Television/radio
- + Advertising
- + Direct mailers
- + Press releases

Digital Marketing

- + Social media
- + Email marketing
- + Digital communication
- + Digital advertising
- + Search ranking
- + Keyword enhancement
- + LinkedIn profile(s)
- + Twitter profile(s)

Success Metrics

- + Digital engagement
- + Social influence
- + Website traffic
- + Search ranking
- + Brand awareness
- + Email open + click rates
- + Advertising impact

WEEK 3

Internal strategy research
branding + design creative
tactical marketing plan

WEEK 4

Internal strategy research
branding + design creative
tactical marketing plan

WEEK 5

Strategy presentation
+ feedback + edits +
coordination

WEEK 6

Strategy presentation
+ feedback + edits +
coordination

MARKETING INVESTMENT

AGENCY RETAINER

Marketing is a dynamic process and your retirement plan business is unique, which is why you should partner with a team that understands your specialized business and can prioritize your needs.

For our clients, we provide custom engagements with simple retainer pricing. As we uncover your business goals during the planning phase, the project scope will take shape and we will create a custom production calendar that will outline deliverables and timelines. Monthly retainer will adjust to reflect scope of project.



We are excited to begin working with you! Our team here at 401(k) Marketing will work with you to identify strategies, implement effective marketing processes and continually evaluate results. This process helps our team to create engaging content and campaigns that will increase your brand presence and elevate you as the premier choice for retirement plan professionals.

Thank you!

The 401(k) Marketing Team

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