

CONTENT CREATION GUIDE

Provided by



In 2021, it's likely that you'll have to use a mixture of old and new marketing tactics to connect with prospects and clients. Take advantage of this handy Content Creation guide to help you plan when, with what and where to reach out.

MARKETING: GETTING STARTED

Today, there are more avenues than ever to connect with people. Always keep in mind your ideal client when reviewing marketing options. Regardless of which you tap into, your success will always depend on whether your message reaches the right people.

When planning your marketing efforts, consider what has worked well in the past, and continue to do what works for you. In addition, push the boundaries by setting aside some time and money to try an avenue that's new to you — maybe it's social media, video or webinars.

Here are some marketing channels to consider in 2021:

- o **Direct mail:** Snail mail is still an effective sales and lead generation tactic, especially when used in conjunction with other marketing outreach.
- o **Lead generation:** There are many approaches to lead generation. If you need a new source of leads, your Ideal Annuity Sales Consultant can share information on our lead generation partners and programs.
- o **Email marketing:** Email marketing has become a staple of connecting with consumers. Keep them up to date on the latest news and offerings.
- o **Video:** Video is a fast-growing segment in marketing. Adding video to your website can boost conversion rates. Social media also presents the opportunity to leverage video through Facebook Live streams or pre-recorded messages.
- o **Display advertising:** Traditional print advertising can help to draw attention to your business, services or campaigns.
- o **Digital advertising:** Advertising online or through social media channels can increase brand awareness.
- o **Brochures or leave behinds:** Printed materials still resonate with many prospects who want to know more about you and your services.
- o **Community events:** Hosting events can increase brand recognition. Consider hosting an open house, summer barbecue, tailgate party, trunk-or-treat or other event that connects with your customers.
- o **Seminars:** A tried-and-true favorite, we hope to get back to in-person events this year. Look for ways to evolve the traditional dinner formula or consider hosting educational events.
- o **Virtual events:** In 2020, we learned just about any type of event can be done online – fundraisers, trivia tournaments, even client appreciation. Consider creative options that might appeal to your target demographic.
- o **Webinars:** The same topics that you use for seminars can be held as webinars. These allow connection during times when social distancing is required but can also be a convenient option for prospects to fit into their day.
- o **Social media marketing:** Connect with people where they spend a lot of time – on social media platforms. Focus on the platform(s) where you have the highest likelihood of connecting with your target client. Make your feed a place for conversation and community, not a billboard for your services.
- o **Web development:** In the digital age, every business must have an online presence. Does yours give a good first impression?
- o **Blogging/thought leadership:** Writing for your website, LinkedIn or industry publications is a good way to showcase your expertise.
- o **Public relations/industry expert:** Local media outlets may look for an industry expert to comment on retirement tips or current events.

Once you have decided which marketing avenues to use in 2021, determine how much you would be willing to spend. Remember, the channels you use and the budget to accommodate them can be fluid, so you can adapt to what's working.

Marketing activities	Budget
Direct mail	
Lead generation	
Email marketing	
Video	
Display advertising	
Digital advertising	
Brochures/leave behinds	
Events	
Seminars	
Virtual events/webinars	
Social media marketing	
Web development	
Blogging/writing	
Resources (software, printing, postage, etc.)	
TOTAL	

IDEAS

We've compiled a plethora of ideas for you to consider in your 2021 marketing. Use these as a jumping-off point for blogs, social media posts, videos, educational events in person or online, direct mail or email campaigns.

First, we've created a calendar with a theme for each month that can be used to reach people across marketing channels. There are a few dates to remember, suggested messaging and tips for each month. Find other fun dates to celebrate at NationalDayCalendar.com, and add those to your plan. After the calendar, we've listed "evergreen" topics that you can use at any time.

JANUARY

Date	Idea	Implementation suggestion
All month	New Year, New Retirement Plan	While people are in a "to-do" mode, encourage them to create or revisit their retirement plan. Share budgeting resources.
All month	Begin to fund 2021 IRAs as of Jan. 1	Remind others to review retirement savings plans this month and set a goal for the year; offer to help them determine whether they are on target for the retirement they want.

FEBRUARY

Date	Idea	Implementation suggestion
All month	Love Your Retirement	Share a success story from one of your clients (make it anonymous and don't share financial details).
February 2	Groundhog Day	<i>Make sure your retirement doesn't feel like Groundhog Day. Set up guaranteed lifetime income for your essential expenses, and save extra for the fun things in life.</i>

MARCH

Date	Idea	Implementation suggestion
All month	Heading Into Retirement Without a Plan is Madness	Share the benefits of guaranteed lifetime income.
March 17	St. Patrick's Day	<i>Don't count on the luck o' the Irish to get you through retirement. I can help you create a plan for saving now and guaranteed lifetime income later.</i>

APRIL

Date	Idea	Implementation suggestion
All month	Financial Literacy Month	Find resources to share at protectedincome.org/retirement-tools .
April 1	April Fool's Day	<i>"A fool and his money are soon parted." Don't let that be you! Create a plan for retirement savings and guaranteed lifetime income today. Reach out to me for tools that can help you get started.</i>
April 15	Tax Day/Last day to fund 2020 IRAs, HSAs	Remind people of the savings maximums for IRAs and HSAs and encourage them to take advantage of these tax-advantaged retirement savings resources.

MAY

Date	Idea	Implementation suggestion
All month	Graduate From Your Career to a Successful Retirement	Share some of your retirement planning tips.
May 9	Mother's Day	<i>Moms, you've dedicated yourself to taking care of your family. But are you taking care of your future self? I can help you plan for retirement and the empty-nester years.</i>
May 31	Memorial Day	

JUNE

Date	Idea	Implementation suggestion
All month	National Annuity Awareness Month	Find resources to share at AnnuRetirement.com .
June 20	Father's Day	<i>Dads, you do all that you can for your children. But do you have a plan for when you can't be there? Let's talk about how to set your heirs up for success.</i>

JULY

Date	Idea	Implementation suggestion
All month	Celebrate Financial Independence in Retirement	Share facts about guaranteed lifetime income.
July 4	Independence Day	
Anytime	Mid-summer marketing push	<ul style="list-style-type: none"> • Host a client appreciation BBQ • Give away a free round of golf • Celebrate National Ice Cream Day (July 19) with an ice cream social, or grill out on National Hot Dog Day (July 22)

AUGUST

Date	Idea	Implementation suggestion
All month	Summers are More Fun in Retirement	Travel, toys, second home, spoiling grandchildren — encourage people to list their wants and needs in retirement. Let them know you can help them with planning, execution and closing any income gaps.
All month	Back to school marketing	<i>Offer a free consultation or review to educators and public-school employees to help them make the most of their 403(b) plans.</i>

SEPTEMBER

Date	Idea	Implementation suggestion
All month	Life Insurance Awareness Month	Find resources to share at LifeHappens.org.
September 6	Labor Day	
September 12	Grandparents Day	<i>Is your retirement giving you the time and money to spend on family that you thought it would? If you'd like to make a change, I can help.</i>

OCTOBER

Date	Idea	Implementation suggestion
All month	Afraid of Outliving Your Income?	Share annuity awareness information.
October 16	Boss's Day	Reach out to business owner clients and prospects.

NOVEMBER

Date	Idea	Implementation suggestion
All month	Long-term Care Insurance Awareness Month	Share facts about long term care; share how annuities can include riders or provisions for access to funds when long-term care is needed.
All month	What you're thankful for	Share your wins in 2021.
November 11	Veteran's Day	Reach out to any veteran clients and prospects to let them know you're thinking about them.
November 25	Thanksgiving Day	
November 28	Hanukkah begins	

DECEMBER

Date	Idea	Implementation suggestion
All month	Year in Review	Look at what content got the most engagement throughout the year and repost it.
December 25	Christmas Day	

TOPICS FOR ANY TIME OF THE YEAR

Idea	Implementation suggestion
Maximizing Social Security	Share the planning tool from Consumer Financial Protection Bureau: https://www.consumerfinance.gov/consumer-tools/retirement/before-you-claim/
Legacy planning	Reach out to your Ideal Annuity Sales Consultant for a link to the webinar Benefits & Beneficiaries: A Tale of Two Successes for tips you can share on this topic.
IRA conversions	Use some of the questions and answers from this article to give people the basics: https://www.annuity.org/retirement/401k-ira-annuity-rollover/
Women & wealth	Share resources from WiserWomen.org .
College fund planning	The Federal FAFSA deadline is June 30. Start talking to clients about their college financial planning needs in May.
Business continuity planning	Offer business owner clients a financial checkup to help them ensure their continuity plans are up to date.
Emotional investing	Reach out to your Ideal Annuity Sales Consultant for a link to the webinar Avoid the Traps of Emotional Investing for tips you can share on this topic.

CONTENT ROADMAP

Blogging and social media posting can seem intimidating, but it's simple when you break it down. Use the following guidelines to create posts each month.

You can write blogs and social media posts in advance and set a calendar reminder to post. Some social media platforms include scheduling features that you can use. Set aside time once a month, every other week, or weekly to write and plan your posts.

Content Type	Description	Social post frequency	Blog post frequency
Articles, videos, infographics	Offer retirement-related information that would be interesting or solve a problem for your clients and prospects.	1-2 per month	1-2 per month
About the advisor	Share something about yourself and engage with your audience so they can get to know, like and trust you.	1 per month	1 per quarter
Themed post	Use the suggested themes on the Ideas Calendar to create content that gets your audience thinking about why they should connect with you.	1-2 per month	1 per month

Lead-generation content	Promote a worksheet, informational flier or industry report to generate leads. Tell the audience that they can get this free resource if they email you or contact you through the platform. Make sure you follow up!	1 per month	This can be included in one of the other blogs or it can be a separate blog, depending on the topic and giveaway
Special posts	Celebrate holidays or share stories that are important to you (example: A local charity is looking for volunteers, and your clients might be a good fit).	As they occur	Only when you have a compelling tie-in between the holiday or special event and your business
TOTAL		4-6 posts per month	2-4 blogs per month

STAY ORGANIZED

Keep yourself on track by creating a content calendar for blogs and social media posts. You can use a calendar, create a document or build a spreadsheet. Set reminders on your online calendar or phone. Whatever you do, commit to consistency in order to see results from your efforts.

If you're creating a spreadsheet or table to track your posts, here are Ideal's suggested categories to track:

BLOGS:

Topic
 Blog ideas
 Blog title
 Date posted
 Notes

SOCIAL MEDIA:

Topic
 Post ideas
 Post wording
 Platforms
 Post date
 Post time
 Notes

Remember to review your post data weekly, monthly or quarterly. Do more of what is getting the most engagement! In December, share your most popular blogs and social posts again as part of a look back on 2021.

If more than one person will be working on your content creation, use this table to keep track of responsibilities and deadlines. Adjust as needed. The suggested deadlines refer to the month before blogs or social posts will go live.

Responsibilities	Assigned to	Timeline	Deadline
Brainstorming		3 days	15th of the month
Finding articles, videos, etc. to share or incorporate into a blog		3 days	18th of the month
Writing blog or social post content		3 days	21st of the month
Blog/social post approval		3 days	24th of the month
Scheduling/posting			End of prior month or on day scheduled
Responding to comments, questions, replies, calls to action			Check platforms daily or weekly, depending on engagement

With a little foresight and planning, you can be well on your way to a more successful 2021. Plus, be on the lookout for new customizable printed materials, resources and tools you can share with clients available only through Ideal Producers Group. Contact us at any time for help, and cheers to a memorable 2021!



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