

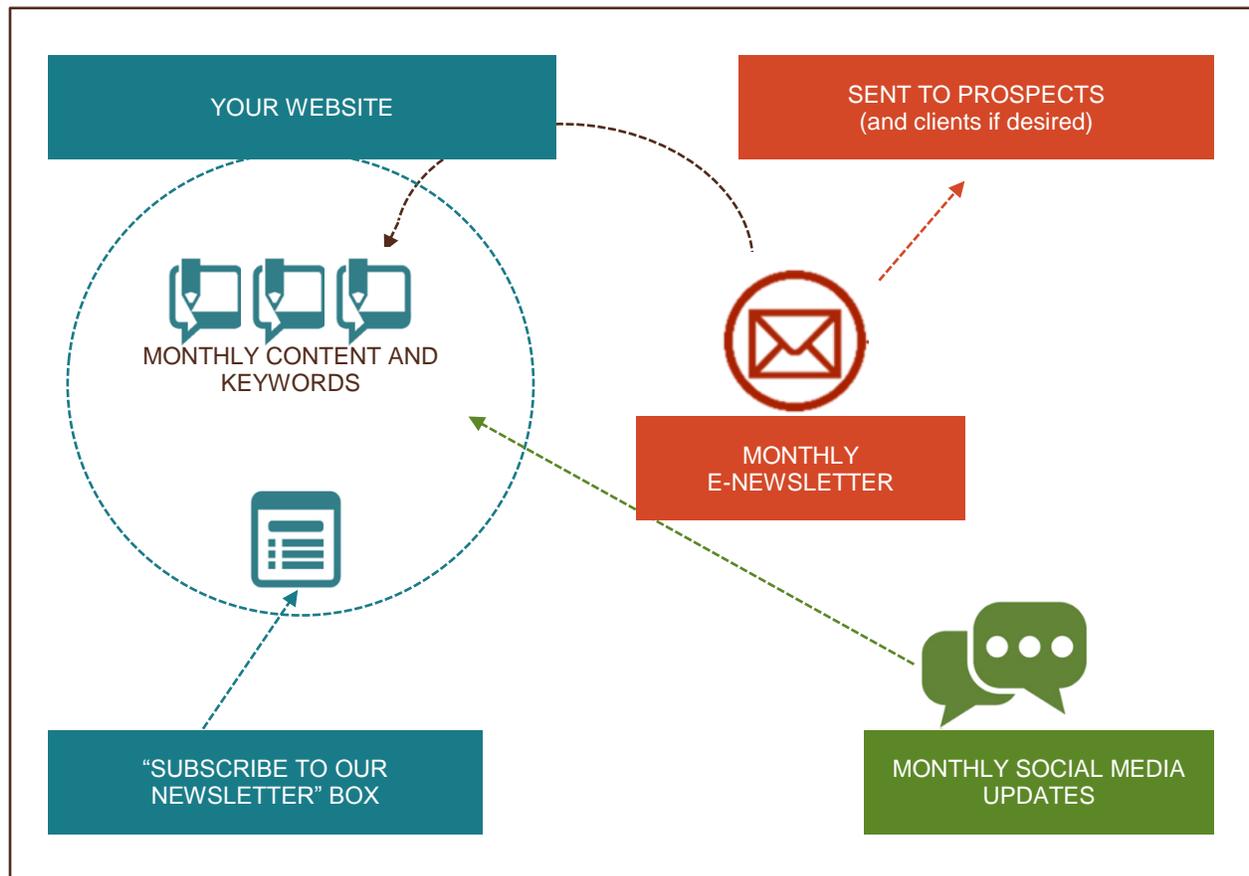
GETTING STARTED

Welcome to **Ready, Set, Sell**, the ShoeFitts Marketing ready-made digital marketing solution for retirement plan advisors. We're excited to help you pursue what you love—helping your clients achieve retirement readiness—while building your business.



While we supply the content, you'll need a few foundational pieces to optimize your marketing effort and your **Ready, Set, Sell** program:

- A desire to dive into just a bit of technology. Nothing terribly complicated—yet likely a bit new for you and other advisors.
- Access to **YOUR WEBSITE**, or access to your webmaster. This is where the monthly content will be loaded along with the associated **KEYWORDS**.
- **E-NEWSLETTER** delivery engine such as Mail Chimp, Constant Contact, or Emma.
 - A way for folks to **SUBSCRIBE** to your newsletter.
- **SOCIAL MEDIA** accounts: An optimized LinkedIn profile and hopefully a Twitter account.



INSTRUCTIONS

MONTHLY CONTENT

Accessing Content

1. Each month when the content is ready, we'll send you an email notification.
2. Login to **Ready, Set, Sell** on the ShoeFitts site with the username and password provided when you registered for the program.
3. Download the content to your computer. There will be four separate Word documents so ensure you've captured them all. They include:
 - Three plan sponsor focused articles on relevant industry topics. Each document includes:
 - A 300-to 500-word article
 - Social media posts for LinkedIn and Twitter
 - Keywords to assist with your SEO (search engine optimization)
 - One ready-made eNewsletter for an ongoing email broadcast to your plan sponsors.

Compliance

For now, you'll need to manage compliance, if required. Our recommendation is to simply download all four documents and fire them off to your compliance department prior to taking any additional steps. Let them know you plan to post them on your site. Note: Sometimes compliance gets concerned about the term 'blog posts'. If this is the case, simply call them 'articles'.

Once you receive the compliance okay or any change requests, do the following:

- Edit the content according to compliance requirements
- We want to stay ahead of any compliance issues as much as possible. So, consider sharing a few of their comments and required changes with us.

Placing Content On Your Website

The articles go directly onto your website, along with the associated keywords (usually into some type of SEO tool). Where you post the articles is up to the structure of your site. Likely a blog or newsletter section makes sense. (Do not post directly to your home page.) If you have a webmaster, simply pass along the content with instructions for where to post.

If your site is self-managed, how you post depends upon your content management system (CMS), such as WordPress, Weebly, etc. With most of these CMS systems you should be able to do the following:

1. Copy and paste the content to your website. The title or headline is the article subject, if you choose to use it as the page name.
2. While the content is in Word and should copy fairly easily, if you encounter problems, paste in the content as plain text and then format within your site.

- Note: Formatting between systems can vary, so check spacing, returns, etc. Be sure to preview a post (or any documentation for that matter) before going live.

MONTHLY E-NEWSLETTER

Your eNewsletter should be sent to your clients and prospects on a consistent monthly basis. Perhaps the third Thursday of each month or the last Tuesday. No worries. Just pick a day between Tuesday and Thursday, get it on your calendar – and be consistent! (Tuesday through Thursday have the highest open rates). The most important consideration is to send the eNewsletter *after* the articles have been posted to your site.

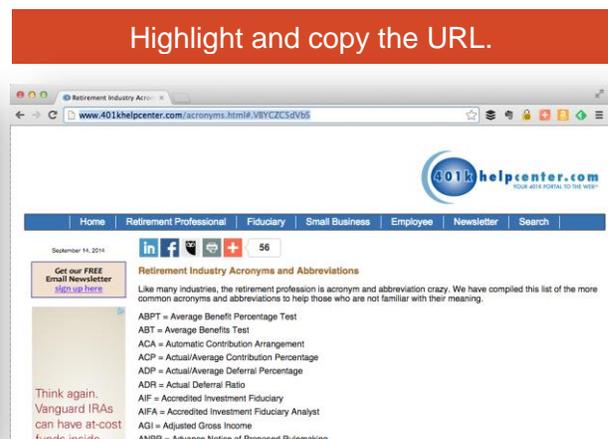
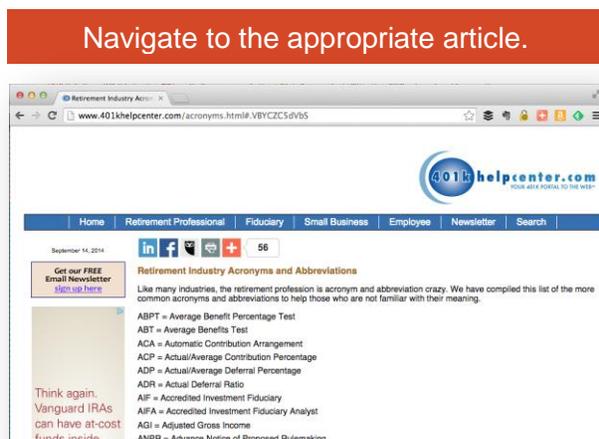
Creating Your Unique eNewsletter

The eNewsletter preparation requires you to understand a bit about URLs and hyperlinks.

- As an example this is a URL: www.shoefitts.com ← the ‘address’ of the ShoeFitts site.
- This is a [hyperlink](#) ← it is a link that takes you directly to the ShoeFitts site.

As you noticed on the diagram on Page 1, we’ve created the newsletter as a ‘push’ type of marketing whereas social media is a ‘pull’ type. In outgoing email broadcasts, we want to link your readers back to your site for the rest of the content. To make this happen you must:

- Read and review the newsletter copy!
- Some of the content will include a note to *<link to article>*. This is your indication that you must access the URL of the article on your site.
 - (There may be other links already in the newsletter to outside articles. No need to do anything with those.)
- For now, keep the content in the original Word format and follow the steps below.
 - Ensure your articles are loaded onto your website.
 - Navigate to the appropriate article.
 - Highlight and copy the URL.



Creating Your Unique eNewsletter (continued)

- Now, simply insert the URL as a hyperlink into the Word content BEFORE placing or uploading the eNewsletter into your newsletter engine such as Mail Chimp, Constant Contact, or Emma. Just select (or highlight) the word(s) or title for the link.

Select (or highlight) the word(s) or title...

Subject Line: Who wants to give their 401(k) participants a kick in the pants to help them save more?

Hello there <First Name>.

Some 401(k) participants want and need a swift kick in the pants to help them save more for retirement. The good news is, plan design auto features combined with the help of an advisor can improve a participant's odds of having enough for retirement – without anyone getting hurt! Auto features not only help more participants save the right amount for retirement, they can also save plan sponsors as much as 50% of their time, while also benefiting the company financially.

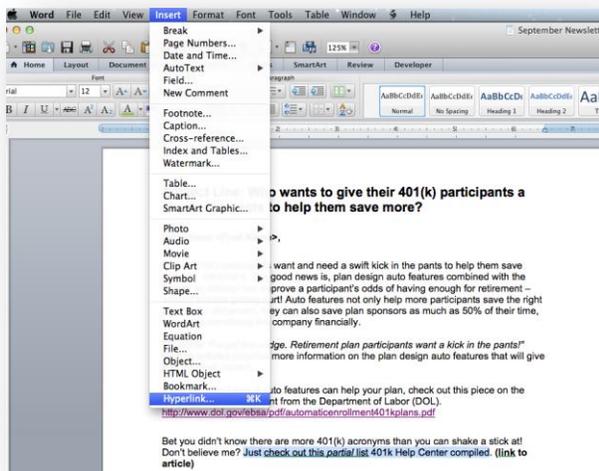
My article "Forget the nudge. Retirement plan participants want a kick in the pants!" (link to article) provides more information on the plan design auto features that will give you the most impact.

If you still aren't sure if auto features can help your plan, check out this piece on the benefits of auto enrollment from the Department of Labor (DOL).
<http://www.dol.gov/ebsa/pdf/automaticenrollment401kplans.pdf>

Bet you didn't know there are more 401(k) acronyms than you can shake a stick at! Don't believe me? Just check out this partial list 401k Help Center compiled. (link to article)

- Then select *Insert* from the Word menu, and select *Hyperlink*. You can do this via the menu, or as a right click on your mouse.

MENU: Select Insert, then Hyperlink.



RIGHT CLICK: Select Hyperlink.

Subject Line: Who wants to give their 401(k) participants a kick in the pants to help them save more?

Hello there <First Name>.

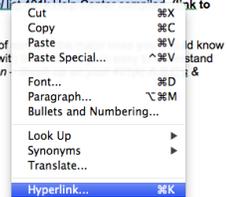
Some 401(k) participants want and need a swift kick in the pants to help them save more for retirement. The good news is, plan design auto features combined with the help of an advisor can improve a participant's odds of having enough for retirement – without anyone getting hurt! Auto features not only help more participants save the right amount for retirement, they can also save plan sponsors as much as 50% of their time, while also benefiting the company financially.

My article "Forget the nudge. Retirement plan participants want a kick in the pants!" (link to article) provides more information on the plan design auto features that will give you the most impact.

If you still aren't sure if auto features can help your plan, check out this piece on the benefits of auto enrollment from the Department of Labor (DOL).
<http://www.dol.gov/ebsa/pdf/automaticenrollment401kplans.pdf>

Bet you didn't know there are more 401(k) acronyms than you can shake a stick at! Don't believe me? Just check out this partial list 401k Help Center compiled. (link to article)

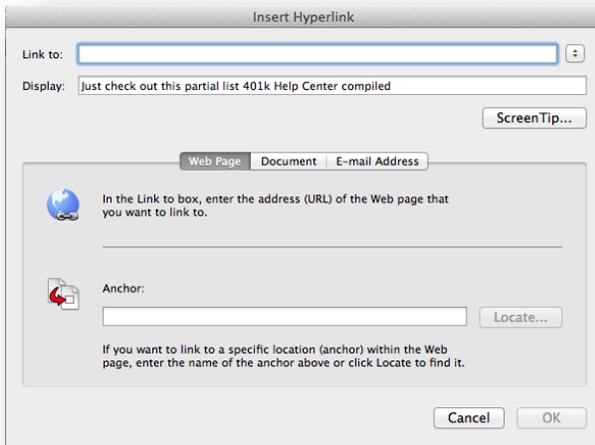
To help you, I've culled a much smaller list of about (from a fiduciary perspective), along with terms in my article "School's back in Session: 1,2,3's!" (link to article).



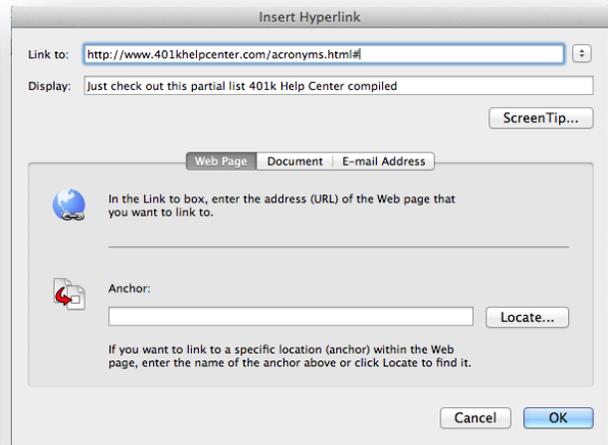
Creating Your Unique eNewsletter (continued)

6. After you select Hyperlink, a pop-up window will appear. Remember the URL you copied in Step 3? Now's the time to paste it into the Link to box (or Address box) and click Ok.

Note the Link to: box.

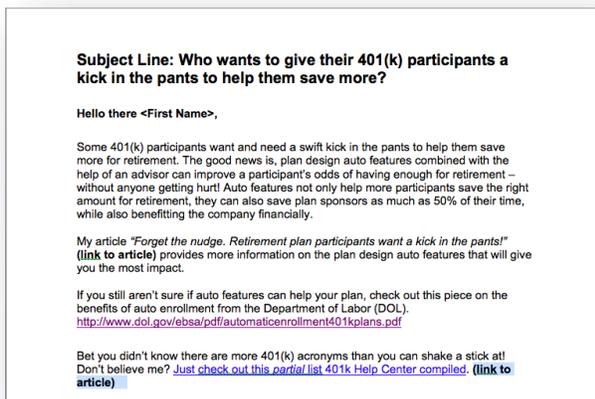


Paste the URL into the box and click Ok.



7. Remove the associated <link to article> text in the eNewsletter content and complete the same steps for any remaining <link to article> inserts.

Delete the (link to article)



8. Select and copy the eNewsletter content (BUT, not the Subject Line) and place or upload to your eNewsletter delivery engine; follow their instructions for formatting, contact uploading and emailing. Remember to add in your own (approved) signature line as a salutation.
 - Use Subject Line text for your email subject/title.
 - Test! Send yourself and your colleagues test emails to ensure you've navigated the process effectively. Click on every link, check the subject line, check formatting, etc.

SOCIAL MEDIA POSTS

Each article includes associated social media posts for LinkedIn and Twitter. There are similar **<link to article>** references within these “sound bites” to allow the connection or follower to read more on your site.

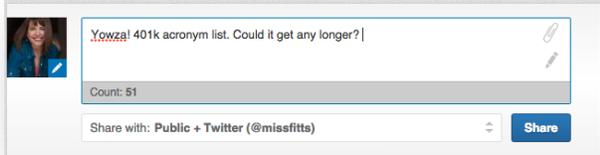
Creating Your Unique Social Post

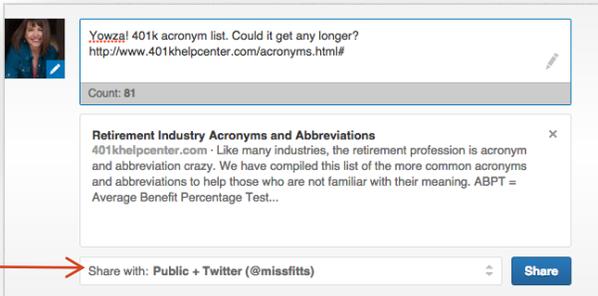
Remember the example of how to copy a URL above? Creating a post that links back to your website article is similar process.

Below is a simplified approach for updating on LinkedIn.

Copy and paste content into LinkedIn.

Copy and paste URL to end of update.

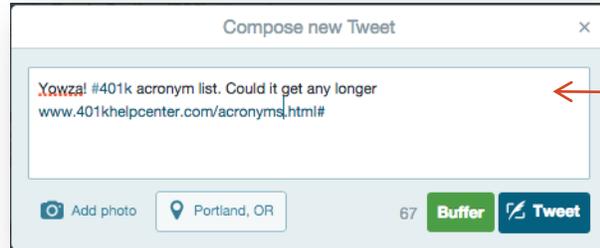




**Select your audience for distribution.
(You may connect your Twitter account.)**

...and for Twitter.

Copy and paste content into Twitter.



**Notice the addition of the # (a hashtag).
Whenever you add a hashtag to your post,
it is immediately indexed by Twitter and
searchable by other users. (Hashtags are
also indexed on Facebook. However, they
are not recognized by LinkedIn.)**

Here's what your post will look like.



HANDS-ON HELP: MONTHLY WEBINARS

We're HERE! WE'RE HERE!

We realize the instructions can feel a bit overwhelming. However, you'll be hyperlinking and hashtagging in no time. That's because your **Ready, Set, Sell** subscription includes monthly support webinars where we'll answer questions, provide tips, and ensure that you are optimizing the program.

Attend these webinars to network with your program peers and learn. You will receive email invitations with links to register. And don't worry if you miss one – they will be recorded for future viewing on the **Ready, Set, Sell** site.

Still have questions? No problem! We're always available to help so send us an [email](#) and it will be sent to the **Ready, Set, Sell** team. Someone will return your message within 24 hours each weekday.