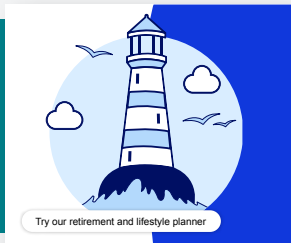


Retirement and lifestyle planner

Example cross channel marketing using the adviser to client marketing toolkit

Web banner

Add to your home page and other relevant areas of your website such as retirement or pensions pages



Email footer

Add to your email signature as a constant feature



Client reviews

Use the upcoming review email template to contact clients and fact-find ahead of the meeting



Social profiles

Add a permanent link to the planner in your profiles

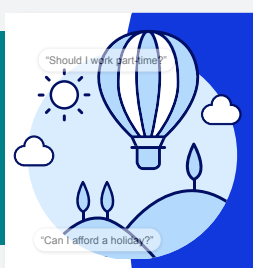
Emails

Use the email templates to contact prospective clients about the planner. You can also include the copy in your newsletter updates as an article with a link



Gif

Use the gif on your social channels as well as the images - videos can get more engagement than static posts



Social posts

Schedule regular posts on your social platforms using the suggested social images and copy



Follow up

Contact all who complete the planner, either with a meeting if they requested one, or using the lead follow up email template

Example case study:

Let's look at how the retirement and lifestyle planner can help a firm

Introduction

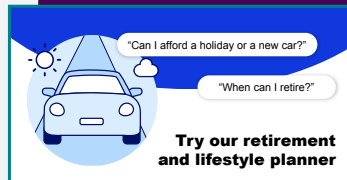
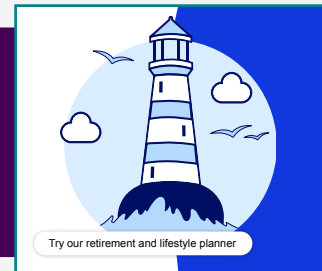


- Joe Bloggs is a financial adviser, who's looking to grow his business.
- He wants to reach a new audience and generate leads he can follow up on, and hopefully convert to become clients.
- Joe currently has a lot of drawdown clients, but decides to target a slightly younger audience instead. He wants to encourage people to engage with pensions earlier and begin contributions as soon as possible.

Marketing

Joe chooses some marketing templates from the Royal London toolkit to promote the retirement and lifestyle planner.

Firstly, he adds a web banner to his firm's website. This encourages anyone visiting the site to begin an interaction and get value from his firm, before having any conversations.



Joe's firm also has a Facebook and Instagram profile. He adds a link to the planner into the profiles, and schedules regular posts on both platforms using the social images and copy from the toolkit. Joe tries a combination of days and times to find which generates the best engagement.

Finally, Joe emails a list of leads he has using the prospecting email template to let them know about the new planner.



Example results

- Joe sees that in the last month, he's had 100 more visitors to the website compared to normal, and the average time spent on the website has increased by 30 seconds.
- He knows from his social profiles that he's had 90 clicks straight through to the planner.
- 40 of these completed it and generated their own personalised report. 10 have requested an initial meeting with Joe to follow up on their report.
- Joe uses the lead follow up email template to contact the other 30 who didn't book an appointment.





Real example: Celtic Financial Planning

- Celtic Financial Planning wanted to widen their audience to include younger clients, and not just those approaching retirement.
- To grow their business, they added the retirement and lifestyle planner to their website homepage and also added a link to their Instagram bio as the main call to action to reach a younger audience.
- As a result, they've seen an increase in page views, more time spent on their page, and have begun generating new leads to follow up on from the targeted demographic.

