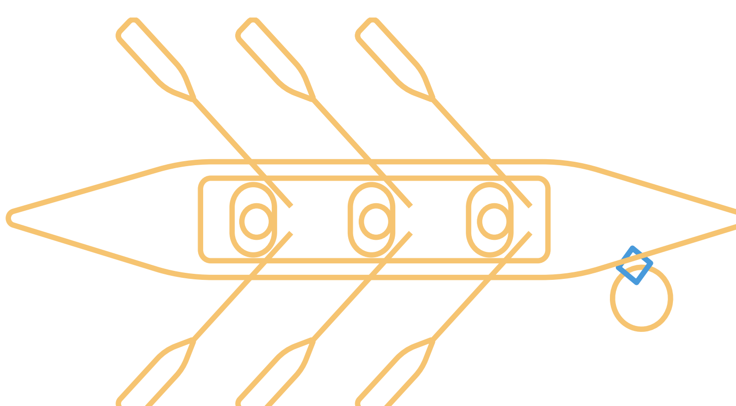
Growth360°

Deepen Client Relationships with Email Best Practices

Use this guide to gain a holistic view of the importance of emailing your prospective and existing clients to stay top-of-mind by providing valuable and timely information.



Staying in regular contact with your prospects and clients through email can help your business grow and build trusting relationships with prospective and existing clients. In this guide, you'll learn about the importance of sending personalized and relevant emails, how you can use client feedback and find more convenient ways to send tailored messages while keeping up with your regular tasks.

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Speak Directly to Your Prospects and Clients

Email is an easy way to effectively communicate and market your business. At its base, email is a digital message delivery system that can send customized, private messages or content to individuals or groups. In present-day marketing terms, email can enable your business to directly reach and send messages to target prospects and help you communicate with your clients.

If you don't already, it's a good idea to add a way to collect email addresses to your website. It could be through a contact form on your website or you could create content where prospective and existing clients have to share their email addresses to gain access to valuable information.

Once you have these email addresses, keep them organized and updated using a customer relationship management (CRM) system.

85%

of the US population are active email users.[1]

59%

of respondents say marketing emails influence their purchase decisions.[2]

Customize the Message to the Reader

Through work with your team, customized email content such as newsletters, service updates, birthday celebrations, holidays, financial dates, market news and promotional content can be created and sent to prospects and clients to help your messaging appear more personalized to your clients' needs. Tailored messaging is easier to accomplish through email, so your company can use email to push your marketing agenda through direct and consistent communication.

Stay Top-of-Mind

Top-of-mind awareness is a key driver in business development and growth. If you can effectively keep your company in front of your clients and prospects you will have more opportunities to engage with them. This is especially true if you create a schedule and stick to it. Create a strategy with correspondence your audience can rely on.

Build Relationships with Your Prospects and Clients

Through emails, you can build more trusting relationships with your clients and prospects by delivering personalized and valuable messages to a specific audience. Sending emails, whether they're newsletters, service updates, promotional content or a holiday message, shows your audience that you're being intentional about creating a personal relationship with them. Make sure your emails follow these best practices.

They add value to the recipient

Make all your emails helpful to the audience by first providing them with valuable content. Once you share valuable information, then you can feel more free to ask for an action in return, such as, a new client referral.

They're personalized

When you send an email to a client, it's landing directly into their inbox; likely one that they check at least once a day. The messages should be relevant to their needs and desires. Make emails feel more personalized by using your name as your email signature.

They're timely and titled

Sending emails between Tuesday and Thursday will have a positive impact on your open rates. A clear and concise title or subject of your email is by far the most important thing to get right.

[1] https://techjury.net/blog/gmail-statistics/#gref
[2] https://www.salecycle.com/blog/featured-en-us/18-essential-email-marketing-statistics/

Types of Emails

In an effort to earn your way into the elusive inbox, try using a variety of different types of emails. Below are three important types of email marketing that you can use to engage with different segments of your audience.

Client Emails

Client emails are designed to make a connection with your clients, communicate important information and remind them of how you can help them. The newsletter is a one-off communication that can be used to send market news, promotional messages, important events, service updates and more. Done well, an email newsletter will help build brand recognition and awareness.

Transactional Emails

Email receipts, invoices, billing statements and order confirmations are examples of transactional emails. They are triggered by user behavior. Transactional emails present a fantastic opportunity to turn a routine email into a path back to your website. Customers want these emails. It's up to you to implement calls to action, branding and readability.

Promotional Emails

Promotional emails are targeted messages based on a user's behavior. Success with promotional email boils down to personalization. By getting to know your customers and creating list segments, you can tailor your emails to be relevant to prospects and clients. Promotional emails are a bit more intrusive so they should be used sparingly and be highly targeted.

Get Started Emailing

These steps will help you get started using email as part of your marketing efforts, whether you're just getting started with email or have already begun an email campaign.

Before you send your first email:

- Set up a company email address to use when sending emails.
- Put together an email list of all your current and potential clients.
- Segment your email list to personalize messages sent to specific clients.
- Set goals to give yourself baseline metrics of what you want to achieve.
- Create a strategy as a roadmap for the type of content you want to send.
- Set up content on your website that incentivizes clients and potential clients to provide their email address.

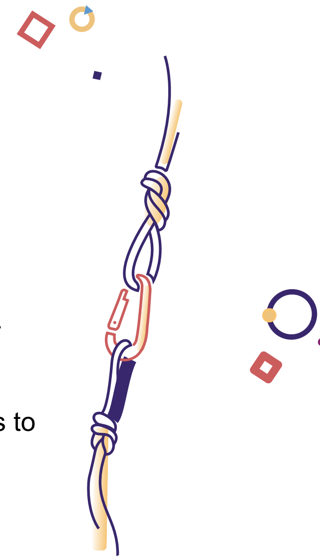
Types of emails to send:

- One-on-one emails
- Automated campaigns
- Monthly newsletters
- Event invitations
- Product or service changes
- Industry updates
- Holiday or client birthday emails
- Portfolio updates

Personalizing Your Emails

Help make every email feel more personalized by using a first name, instead of a generic greeting! These are called Merge Tags and usually look something like this:
Hi [first_name],

Make Emails Automatic with MarketingCentral Content

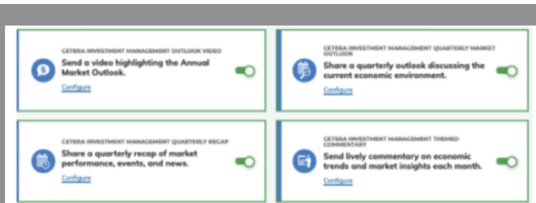


In partnering with Cetera, you will receive customized Cetera content aligned with your business to help automate your email marketing. This content contains newsletter articles on major events, market trends, economic overviews, and user-specific newsletters that relate to different segmented portions of your email list and holiday content creation layouts.

Each of these campaigns are provided by Cetera and can be automated based on your company's data to send out to consumers.

Log in to MarketingCentral and choose from over 75 different proprietary content pieces to share automatically with your clients and prospects.

- Market Outlook (quarterly and annually)
- Recaps (weekly, monthly and quarterly)
- Financial Watch (monthly)
- Retire Wise (monthly)
- Commentaries (ad hoc)



To run a robust email program, enable all MarketingCentral email automations.

Set Specific Goals

Success will look different for every email campaign or even type of email you send. This is why it's important to set goals for yourself based on the specific email you're sending and the audience you're communicating with, while taking into consideration your business strategy.

A few goals to consider are:

- Improved traffic to your website
- Know and improve your open and click rates
- Increased brand awareness of your company
- Increased connectivity to your clients
- New leads or referrals
- Gaining helpful feedback and insight from clients
- Sell additional products or services

Get Detailed Recaps

The MarketingCentral Automations provide weekly, monthly and quarterly recaps to help you reach your goals. These tools can also help you get a better picture of how your emails are performing.

Reach Your Clients Through Text Messaging

Use MyRep Chat for Compliant Client Chat

People are constantly attached to their phones. Finding a respectful and helpful way to text your clients can give you another great way to stay top of mind. MyRepChat offers Cetera clients a fully compliant method to messaging your clients. Beyond email marketing, this is the most personalized form of marketing that a business can achieve.

MarketingCentral Quarterly Plan

The Cetera Advisor Marketing team compiles a step-by-step quarterly marketing guide. Set up a time to walk through the quarterly plan with your Growth Officer.

Email Compliance Safeguards

Staying compliant is vital to protect you and your company's reputations. Take care to avoid language in your emails that sounds promissory or misleading. Use clear, accessible language in every email. These quick steps can help you establish a system of checks within your firm.

5 Simple Steps to Safeguard Your Firm

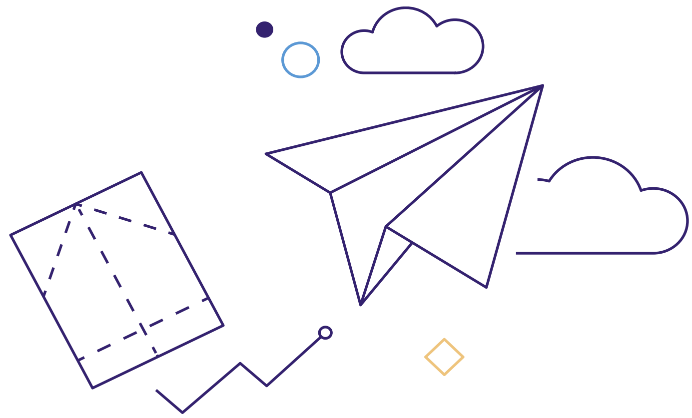
1. Learn about the risks: talk with your legal or compliance department. If applicable, ensure any pre- or post-publication FINRA filing requirements are met. Also make sure that material meets content standards, testimonial and recommendation requirements.

2. Get clear guidelines on how and where you should use specific language. What kind of language do you need to avoid (promissory claims or performance guarantee language)? What disclosures are needed and where should they appear?

3. Establish guidelines for reviewing materials and set up approval hierarchies. Make sure your whole team is aware of these protocols. In review, ensure content does not create any best interest failures or other fiduciary failings.

4. Verify your email content has all the required disclosures.

5. Whether it's you personally, your compliance officer or a trusted vendor, make sure that someone is watching for errors and the correct changes are made before the content goes public.



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Email Overview

Sending emails and being in regular contact with your clients can help grow your business and create more personalized relationships with your current and prospective clients. It's a simple strategy to begin using and you can build on the skills you already have. MarketingCentral, Cetera's digital marketing platform, can help support your emailing efforts and make creating and sending emails to clients easier.

Use the stages below to assess where you are today and find new opportunities for growth.

Visible

Success at the first level is about making sure you have a company email address you can use to send emails. This helps keep one person in the firm from being flooded with email replies from any emails sent to clients. At this level, it's also important that you have a way to collect new client and prospect email addresses through your website. Your company should start using different types of emails to engage with the different segments of your audience.

Active

Success at the second level is about receiving and using the email feedback you get from your clients. This feedback is essential as the clients are letting you know what type of emails they want to receive. It's also during this stage that you should use MarketingCentral's email templates and content to send valuable emails to your clients.

Optimized

The third level is about creating an email strategy and setting goals for your messaging efforts. To meet your goals and simplify your email strategy, you might consider using a scheduling tool. If you feel good about using email, you might also begin using text messaging as a way to communicate with your clients.

MarketingCentral by Cetera

Build a strategy for growth with MarketingCentral, a powerful suite of tools built exclusively for you by the Cetera Marketing team. MarketingCentral is a comprehensive multi-channel platform with pre-approved email templates, social media content, downloadable event kits, presentations and so much more that you can fully customize to meet your business and client needs. Take the guesswork out of marketing and focus on growing your business.

Learn more at https://fmgsuite.com/marketingcentral/experience/cetera-resources/

QuickStart Guide

Get up and running with this step-by-step guide to MarketingCentral.

Interactive Webinars

Register for an interactive webinar to learn more about the MarketingCentral tools and get assistance with any questions.

Marketing Strategy & Best Practices

Put together a solid client and prospect outreach strategy designed to get results with the help of this straightforward guide.

MarketingCentral Automations

Explore opportunities to automate marketing communications across email, social and print.

Growth Guides

Drive leads and increase prospect conversion rate with these Client Prospecting and Conversion Guides.

Events Guide

Leverage MarketingCentral and these tips to plan, manage and promote your next client or prospect event.

2021 Marketing Calendar Template

Plan the next year of marketing content and strategy with this calendar template.

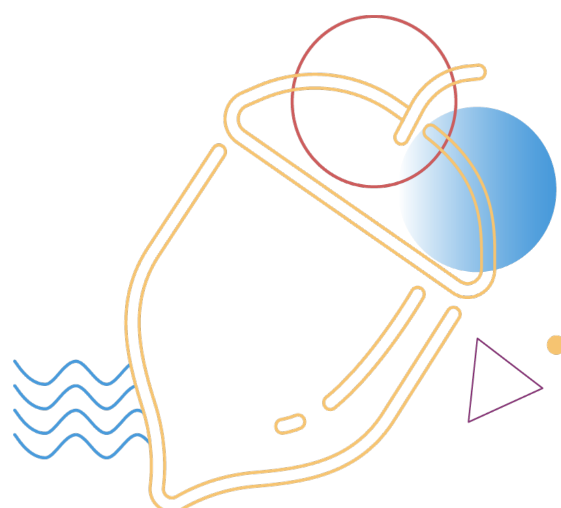
Required Record Retention

MarketingCentral is an approved record retention tool.

Using MarketingCentral as a Team

Use these tips to personalize a profile if you are using MarketingCentral as an ensemble team or program.

Additional Email Resources



QuickStart Guide

Use MyRepChat

MarketingCentral Automations

Quarterly/Yearly Marketing Calendar

'Cetera Financial Group' refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members FINRA/SIPC. Located at 200 N. Pacific Coast Highway, Suite 1200, El Segundo, CA 90245-5670. Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.