



Setting Up Marketing Suite for a Newly Formed DBA

Steps to consider

Branding:

- ❑ **If you have an established shared brand:** each member of the DBA should [update their Marketing Suite accounts with the DBA logo](#) for your new producer group.
- ❑ **If you are looking to establish a brand and need creative support:** please reach out to brand@equitable.com for more information on available resources.

Compliance:

- ❑ Once you have approved DBA, make sure to [update your email and website disclosures](#) in Marketing Suite to ensure you are compliant when using your new branding. This step is required in order to utilize your new branding.

Website Considerations:

- ❑ **If you would like to set up a website for your DBA:** review the [pre-build website checklist](#) and [schedule a demo](#) of the website platform through our program's microsite. If you decide to move forward, our approved website vendor FMG will help with the initial creation and ongoing maintenance of your website.
- ❑ **If you already have a website on Marketing Suite:** [add your team members to your website](#) by creating a profile for them under the 'team members' section of your website account, this will get your team listed and visible on your site.
- ❑ Each member of the team should also [list your shared DBA website URL](#) on their individual profile in Marketing Suite. This will ensure so the new branding appears in their email and landing page signature blocks.

Landing Page:

- ❑ For times when a member of the group wants to keep exclusivity of their leads (but still wants to operate under the DBA branding) then we would recommend they utilize their personalized landing page attached to their MS acct. [The landing page can be updated to reflect the shared DBA](#) brand logo, and colors, and can include a link back to the full website – but it will allow the advisor to use their own lead capture form and keep that exclusivity of any leads generated through the landing page.



Steps to consider continued

Email:

- ☐ Since only one individual account can be tied directly to a website in EAMS; if you want the team's emails to drive traffic back to your shared website, then they will need to include a direct link to the site within their emails. The email link could be as simple as a link to the DBA website homepage or contact page, or it could be more targeted and drive to a page focused on a timely relevant topic, or even to a lead generation landing page.
- ☐ Note: we are currently working with FMG to create functionality that allows teams to easily share approved custom content with other members of the team directly in the platform, as well as, the ability to share contact lists across multiple advisors in a group for easier DBA-level communications.

Events:

- ☐ **For teams with a shared website:** we recommend creating the event's registration page directly on the shared DBA website. Once the registration page is live on the website, each team member should send event invitations directly from their own Marketing Suite accounts but within the invitation, include a link to that event registration page on the DBA website. More information and detailed instructions can be found on page three of the [event QRC](#).
- ☐ **For teams without a shared website:** follow our standard events process detailed in the [event QRC](#).

Social Media:

- ☐ We recommend all advisors in an approved DBA update their branding on their approved social media profiles. Review our [LinkedIn](#) and [Facebook](#) QRCs for more information on updating your social profiles.
- ☐ Individual team members can tag the main DBA social pages (if there are any) directly in their social posts as needed. Sharing of posts is not currently supported in Marketing Suite.