

QRC – Equitable Advisors Marketing Suite Checklist

GENERAL OVERVIEW

A checklist email is available in Equitable Advisors Marketing Suite (Marketing Suite) designed to identify any pertinent changes to a client's personal or financial circumstances that may require review or discussion. Client checklist responses will route to the sender via a Salesforce opportunity and email through integration.

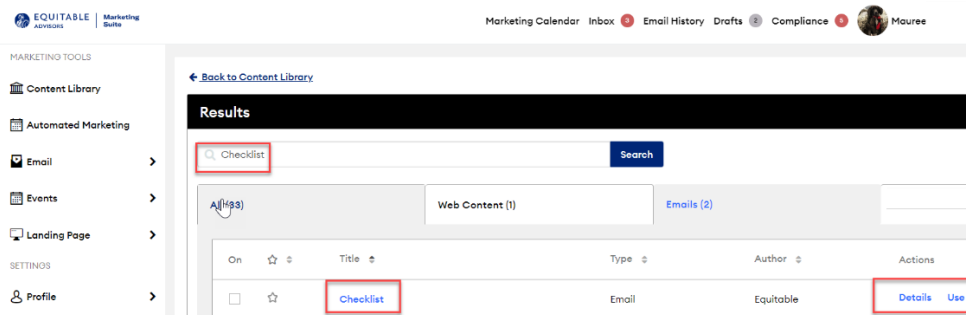
This QRC outlines:

- The process to send a checklist through Marketing Suite to campaign member recipients
- Viewing checklist responses via email
- Opportunity creation in Salesforce

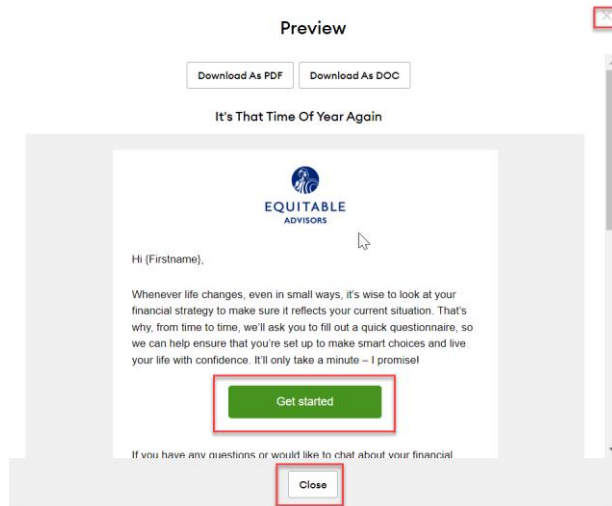
Note: Due to the integration with Salesforce, checklist recipients must be Marketing Suite contacts created via Salesforce integration. Any attempt to utilize a .csv list uploaded list or manually entered contact will not process from Marketing Suite.

SEND CHECKLIST TO RECIPIENTS

1. In the Marketing Suite Email Content Library search for and select "Checklist."

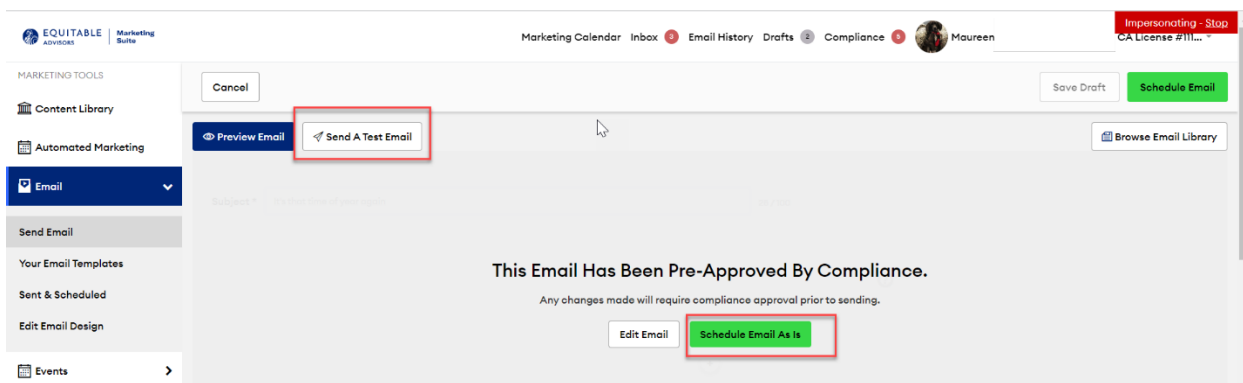


2. To preview the email click on Document Title or click on Details.





3. To view the information request web form, select "Get started". *Note: to return to content library from the web form you must use the browser back button.*
4. After the content has been reviewed, select "Use" under actions.
5. It is a recommended best practice to Send a Test Email to yourself or a staff member prior to sending any content from Marketing Suite.



Enter the recipient email address for the test email and select Send a Test Email.



6. Once email reviewed and you wish to proceed, select Schedule Email As Is and select the appropriate recipient group select Next. *As a reminder, because of the integration with Salesforce, recipients for the checklist must be those that are synched with your Salesforce and not manually entered or imported via a .csv file upload.*



The screenshot shows the 'Select Your Audience' step, which is the first of three steps in the process. The steps are: 1. Choose Audience, 2. Choose Send Date, and 3. Confirm. The 'Choose Audience' step is currently active. The main heading is 'Select Your Audience'. Below it, a subheading states: 'We can send this email to all of your contacts, to groups, or to individuals.' There are three radio button options: 'Send to all contacts' (unselected), 'Send to group(s)' (selected), and 'Send to an individual' (unselected). Under 'Send to group(s)', there is a search bar labeled 'Search by group name'. Below the search bar are three checkboxes: 'Auto Filter campaign' (unselected), 'FMG Checklist' (selected), and 'Prod release test' (unselected). At the bottom of the form, there are three buttons: 'Never Mind', 'Back', and 'Next'. The 'Next' button is highlighted with a red box.

7. Schedule the time to send email (default send time is ASAP but can be changed to a future date) and click Next.

The screenshot shows the 'Choose Your Send Date' step, which is the second of three steps in the process. The steps are: 1. Choose Audience, 2. Choose Send Date, and 3. Confirm. The 'Choose Send Date' step is currently active. The main heading is 'Choose Your Send Date'. Below it, a subheading states: 'Send your email ASAP, or schedule it for the future.' There are two radio button options: 'Send ASAP' (unselected) and 'Schedule a future date' (selected). Under 'Schedule a future date', there is a text input field labeled 'Send date time' containing the date and time '09/29/2023 09:30 AM' and the time zone 'EDT'. At the bottom of the form, there are three buttons: 'Never Mind', 'Back', and 'Next'. The 'Next' button is highlighted with a red box.



8. Confirm details (including signature name) and select Send Email

✓

Choose Audience

✓

Choose Send Date

3

Confirm

Confirm Your Details

Please double-check to make sure you're all set.

Your Email Will Be Sent To:
Group(s): FMG Checklist [edit](#)

Your Email Will Be Sent On This Date:
09/29/2023 at 9:30 AM EDT [edit](#)

Your Email Will Be Signed As:

☒ Ma Demo (Display Name)

☐ Equitable Advisors (Company Name)

☐ Think you might send this email again? Save it as a template for future use.

Never Mind

Back

Send Email

9. A confirmation email will display.

✓

Your Email Is Ready To Roll

Your email will be sent on 09/29/2023 at 9:30 AM EDT.

Close

VIEWING CHECKLIST RESPONSES

When a client or prospect responds to the checklist, it will create a Salesforce Opportunity in real-time.

An email notification from the Lead Mgmt Team (lead.mgmt@equitable.com) will generate. The email will contain the checklist responses, as well as a link to view the Salesforce opportunity.



You have received a response from the MMS Checklist Response Campaign

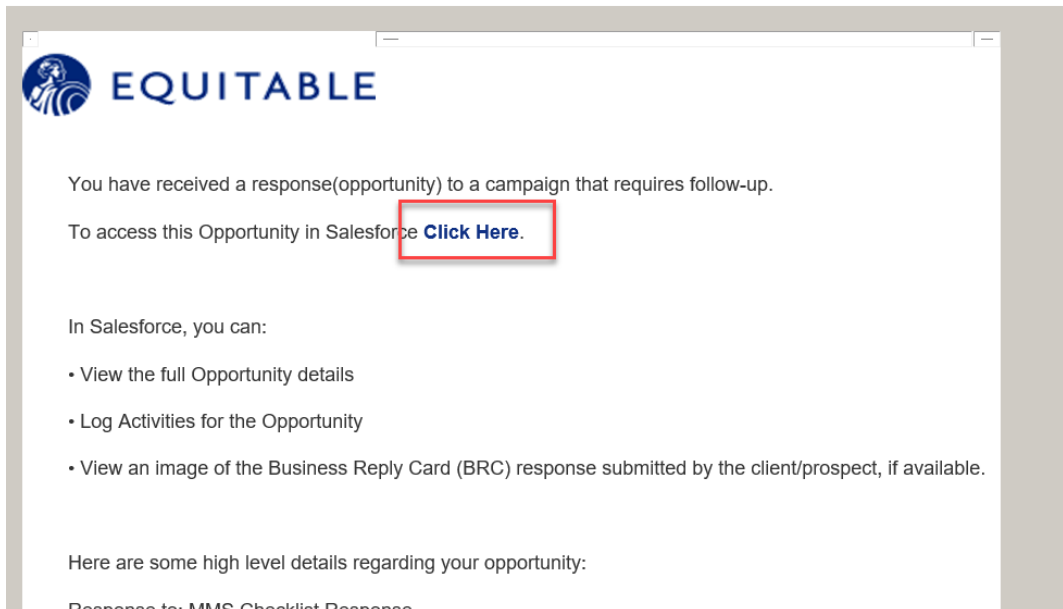


Lead Mgmt Team <lead_mgmt@equitable.com>

To

Retention Policy 1 - Delete emails after 7 years for online mailbox + archive (7 years)

 If there are problems with how this message is displayed, click here to view it in a web browser.



Clicking **Click Here** will open the opportunity record in Salesforce if already logged into equitable.com.

Within the opportunity, checklist responses will appear in the **Comments** field and will be related to the specific client/prospect record.

The comments provide an excellent way to track any follow-up activities related to this response and client.

It is recommended that you document any product interest and future activities that result from this response and track the opportunity through to completion by updating the stage as appropriate.

All responses will link to a generic campaign in Salesforce titled **MMS Checklist Response**.

An activity (task) record will capture the email sent, as well as click/open rates on the Client/Prospect record in Salesforce.



Logged in as - Equitable Annuity Eapp (annuity_eapp_design@equitable.com) | Log out as - Equitable Annuity Eapp

Search: All | Search...

Sales | Home | Leads | Opportunities | Clients/Prospects | Contract/Accounts Reports | Chatter | Reports | Activities Home | Relationship Groups | Campaigns | CUR Assignees | 301619261 | Tasks

Name: Maureen Emailtest | Related To: Maureen Emailtest

Details | Attachments & Notes

Task Information

Assigned To: Equitable Annuity Eapp | Type: eMail Marketing | Subject: It's that time of year again | Comments: Content ID: 4267054 | Submitted B: 563

Related To: Maureen Emailtest | Name: Maureen Emailtest | Due Date: 11/3/2023

Additional Information

Status: Completed | Priority: Normal

eMail Activity

Email Order Type: EMAIL | Delivery Status: Sent | Last View/Open: 11/3/2023 4:17 AM | Last Click: 11/3/2023 4:22 AM

Recipients Email: itable.com | Delivery Status Date: 11/2/2023 8:00 PM | View/Open Count: 2 | Click Count: 4

All other standard Marketing Suite functionality will be applicable to the checklist.

READY TO LEARN MORE?

- Visit our program microsite: <https://micro.fmgsuite.com/equitable/>
- Contact Support: Equitable@fmgsuite.com or (858) 500-5479
- Contact MarTech Project Team: AdvisorMartech@Equitable.com