

Field Bulletin

January 10, 2024

FB 24-004 | For Financial Professional Use Only

This field bulletin supplements FB 23-135.

Audience: Equitable Advisors Financial Professionals

Re: Equitable Advisors Marketing SuiteSM (decommission of My Marketing Station)

From: Wealth Management Marketing and Digital

Action Needed: We recommend that all Financial Professionals and their administrative staff take advantage of these onboarding and training opportunities as early in Q1 as possible to become familiar with the new platform prior to the decommission of My Marketing Station on March 31, 2024.

What's new:

Highlights for 2024:

- Equitable Advisors Marketing SuiteSM powered by FMG is the new integrated advisor marketing platform for email, website and (limited) social content.
- Access to Marketing Suite (exclusive of websites) is included within the basic Digital Essentials package.
- Financial Professionals (FPs) must obtain Branch Controls Manager (BCM) approval (requested within the FMG tool) for any Marketing Suite user profile changes before utilizing Marketing Suite functionality.
- Marketing Suite is integrated with Change User Role allowing access to administrative staff members or joint work partners.
- Marketing Suite is integrated with Salesforce and allows greater flexibility in creating campaigns to segment your existing clients and prospects.
- Marketing Suite supplements the Website optional subscription offering introduced in [FB 23-135](#).
- Onboarding and training support will be available through national webinars, complex led training, and self-serve video trainings and reference materials.
- My Marketing Station (MMS) will be fully decommissioned by 3/31/24 and all user access and scheduled emails or subscriptions cancelled by that date.
- FP profile images on Equitable Client Portal will be sourced from Marketing Suite profile images only.

When:

- Access to Marketing Suite will be available to all FPs subscribing to Digital Essentials on 1/22/24.
- New users will no longer be granted access to MMS effective 1/22/24.
- Onboarding support for existing FPs and their administrative staff will continue through mid-March.

For More Information:

- See the following pages for details.
- Please visit the [program microsite](#) and [EAVU](#) to review training materials and reference guides for Marketing Suite.
- If you have questions, contact advisormartech@equitable.com or reach out to your complex digital or marketing specialist.

Program Overview

Equitable Advisors Marketing SuiteSM powered by FMG is the new integrated advisor marketing platform for email, website and (limited) social content. Through our partnership with the Honor Guard, National Associate Forum and Elite Advisor Group, numerous vendors were vetted to find one with great designs, better content, and an easy-to-use platform. After completion of a series of field user pilots, we are pleased to introduce Marketing Suite to all FPs on January 22, 2024.

Marketing Suite, which will replace the email marketing capabilities of My Marketing Station, and more, is available to all FP's and their staff members via Change User Role effective 1/22/24 as part of basic digital essentials. Please note that the website offering replacing Emerald Websites as introduced in [FB 23-135](#) is also available, but at an additional subscription cost described in the field bulletin.

Functionality Overview

Marketing Suite provides an expanded marketing toolset to Equitable Advisors and includes the following functionalities:

- Single sign-on from Equitable.com. Look for the Equitable Advisors Marketing Suite icon in the tools section of the advisor portal. For easy access, be sure to "favorite" Marketing Suite by selecting the star in the tool icon
- Salesforce Integration – Marketing Suite is integrated with Salesforce and allows greater flexibility in creating campaigns to segment your existing clients and prospects for targeted marketing efforts. In addition to the ability to utilize client filters or views, users can also add members to campaigns from Salesforce reports which may allow you target recipients based on specific product holdings. Salesforce activity records are created to track marketing efforts to imported client/prospect records.
- Contact Upload – In addition to the Salesforce integration, users can upload .csv files of contacts into Marketing Suite.
- Integration with Change User Role (CUR) – Marketing Suite is integrated with Change User Role to allow your administrative staff or joint work partners to act on your behalf and manage your marketing activities. Utilize the Change User Role Administration tool to set CUR access up. For full marketing functionality the CUR delegate must also be set up with access to Salesforce via CUR. CUR set up will take 24 to 48 hours to complete.
- Content Library - A robust content library including pre-approved web content, emails, email sequences, greeting cards* and downloadables. Content is categorized in "collections" on like topics and is also easily searchable by author, topic, and type. Most of the content available is pre-approved by Advertising Compliance and, if unmodified, will be available for immediate use without further compliance review. Content is refreshed regularly with FMG adding approximately 20 to 30 new pieces per month on relevant topics.
 - *There is an additional per piece charge for physical greeting cards (payable directly by the FP)
- Automated Marketing Campaigns – Several automated marketing campaigns are available that allow you to "Set and Forget" outreach to selected clients or prospects via email, social or direct mail channels. These campaigns are turned off by default but are easily toggled on and configured to use for your desired audience.
- Email – Email functionality includes the ability to email pre-approved pieces or sequences from the extensive content library or create/customize emails and templates ([restrictions apply](#)). Email metrics (sends, opens, etc.) are captured within the platform. Users will also be able to customize

their email design if desired. Note: Any customizations will create a compliance case for review.

- **NEW** Landing Page – All Marketing Suite users will have the ability to personalize a standalone web page (landing page) designed to help market their practice. It is typically where a visitor “lands” after they click on a link in an email, ad, or social post. As part of the Marketing Suite subscription, users are provided a landing page with form capture to use in their marketing efforts at no additional cost. Landing pages are a value-add of the platform and serve to provide a digital presence without the additional cost of a website. Note for Marketing Suite website users: Website users will not see the landing page tab in their dashboard as they can easily create custom landing pages within their website. The custom landing pages will automatically reflect their website design and branding and can be linked to from within their website’s navigation.
- **NEW** Events – Users will have the ability to create and promote events within the platform and track participant registrations. Please review page 3 of the [Events QRC](#) for more details. A dedicated event landing page is created for each event for website users. Marketing Suite only users will create a landing page as part of profile set up that will manage events registrations and capture any lead generation activities from web content.
- **NEW** Marketing Calendar – A marketing calendar is contained on the Marketing Suite dashboard that displays scheduled emails, email sequences, social posts**, social sequences, upcoming greeting cards, and content from campaigns for the upcoming 14 days.
** Only limited social media functionality is available in Marketing Suite – most of the publishing, and creating custom social media posts and profile updates will continue to be done in Hearsay Social
- Compliance Dashboard – Compliance review for website updates, profile updates (BCMs) and custom email content (Advertising Compliance) is done within the platform. A compliance module on the dashboard allows users to easily review the status of any compliance cases. Cases with compliance, rejected by compliance and compliance history are all maintained within the dashboard.
- Inbox – An inbox is available within platform to capture important information such as event registration notices and lead forms.
- Equitable Client Portal will display your Marketing Suite profile picture in the “Your Financial Professional” section of ECP. Images on former Broadridge Emerald websites will no longer be the source of these photos.

At this time, social media functionality within Marketing Suite is limited to:

- Enrollment in the Social Foundation automated marketing campaign
- Sharing pre-approved (non-editable) web content

All other social content and creation of custom content to be published via Hearsay Social

Posting social content via Marketing Suite requires that your Facebook Business Page and/or LinkedIn profile is connected through Hearsay Social. You will need to connect your compliance approved social media sites to your Marketing Suite profile by following the steps listed [here](#).

Training and Rollout Support

Onboarding support for Q1 2024 will include:

- National Onboarding webinars: these webinars will focus on walking users through the onboarding checklist to complete their profiles and change user role setup for admin staff. User profiles must be reviewed and approved by BCMs prior to utilizing the Marketing Suite. **Note: the content of these**

webinars will be repeated so you do not need to attend all sessions.

- **Monday, January 22, 2024: 2pm -3pm (ET)**
- **Friday, January 26: 1pm – 2pm (ET)**
- **Monday, January 29: 2:30pm – 3pm (ET)**
- **Thursday, February 1: 3pm – 3:30pm (ET)**
- Salesforce Integration Webinars: these webinars will focus on the integration between Salesforce and Marketing Suite and will walk users through creating Salesforce campaigns and synchronizing your Salesforce contacts into Marketing Suite.
 - We recommend reviewing the Salesforce training videos contained on the [microsite](#) or in [EAVU](#) prior to attending training so you are prepared to ask questions. Note: Please review [Salesforce QRC](#) prior to viewing the Salesforce training videos (please watch videos in order).
 - **Kick-Off Sales Webinar: Tuesday, January 30: 1pm – 2pm (ET)**
- Office hours – Biweekly office hours are scheduled to allow users to dial in with questions related to Marketing Suite. Project team members will be present on these calls to assist with any questions or issues that users are experiencing.
- Additional training and rollout support - Please click the following calendars for additional salesforce webinars and the open office hours schedule:
 - [January Training Calendar](#)
 - [February Training Calendar](#)
 - [March Training Calendar](#)
 - [April Training Calendar](#)
- Resources (including videos, Quick Reference Guides, onboarding checklist and a link to the extensive FMG knowledge database) can be found on the microsite and in EAVU.
- We strongly recommend that your administrative staff members attend these scheduled calls to become familiar with the platform and assist in your marketing efforts.
- Local support from your Complex Digital and Marketing lead is also available.
- Questions can also be forwarded to the shared mailbox advisormartech@equitable.com

Stay tuned for further communications and updates on training and onboarding activities.

We recommend that all users take advantage of these onboarding and training opportunities as early in Q1 as possible to become familiar with the new platform prior to the decommission of MMS on March 31, 2024.

My Marketing Station (MMS) Transition Information

To support the rollout activities for Marketing Suite the following info relates to MMS.

- New FPs- Providing access for newly onboarded FPs to MMS will be discontinued on 1/22/24.
- Existing MMS subscribers –
 - Access to MMS for users who have not logged in within 6 months or have any active orders or subscriptions will be removed on or about 2/23/24.
 - Access to the remaining subscribers will be removed on 3/29/24.
- New content will continue to be posted to both platforms until 2/29/2024. After that date, new content will only be posted to Marketing Suite.
- [Custom email content](#)* (if allowable) can only be submitted in Marketing Suite after 3/1/24. Material with multiple distribution channels must still be submitted through AdTrax.

- The Retirement Readiness campaign is discontinued for 2024. Use of the Retirement Insights automated marketing campaign is a suggested alternative.
- The final Monthly MMS Newsletter subscription will be sent the week of March 12th, 2024.
- All active MMS birthday subscriptions will be cancelled on 3/29/24.
 - As a reminder if you activate the automated marketing birthday email campaign in Marketing Suite, be sure to cancel any active birthday subscription in MMS to prevent contacts from receiving duplicate emails.
- All remaining active orders will be cancelled on 3/29/24.

For More Information:

- Please visit the [program microsite](#) to review training materials and reference guides and in [EAVU](#) for Marketing Suite.
- If you have questions, contact advisormartech@equitable.com or reach out to your complex digital specialist.
- Stay tuned for further communications on this transition.