



Communications Checklist

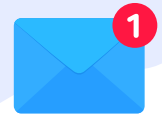
Create consistent email and text communications to **stay top-of-mind with your clients and prospects.**

Define Your Communication Channels

- ☐ Email
 - Ideal for newsletters and comprehensive information
 - Perfect for personalized messages like birthday and anniversary celebrations
- ☐ Texting
 - Best for quick, personalized messages
 - Great for [appointment confirmations](#) and document follow-up

10X

Email and texting combined can increase customer engagement by 10X*



Segment Your Audience

- ☐ Minimum segments: Clients and Prospects
- ☐ Advanced segmentation by:
 - Investing stage
 - Retirement proximity
 - Lifestyle interests
 - Specific financial goals
 - Hobbies or demographic characteristics

Email Best Practices

- ☐ Craft [Compelling Subject Lines](#)
 - Use attention-grabbing, value driven language



Leverage free AI tools or [subjectline.com](#) for optimization

- ☐ Personalization Techniques
 - Address recipients by name
 - Tailor content to specific segment needs
 - [Add a personal touch](#)



Content Creation

- Simplicity is Key
 - Write at a 7th-9th grade reading level
 - Use the Flesch Kincaid score to test readability
 - Minimize industry jargon
 - Create easily scannable content
- Clear Call-to-Action
 - Define a single, prominent action for recipients
 - Make the next step obvious and straightforward



Timely emails tend to see DOUBLE the usual open rate

Technical Optimization

- Mobile-Friendly Design
 - Ensure responsive email and text templates
 - Test on multiple devices
 - Use legible fonts and appropriate sizing
- Performance Tracking
 - Monitor key metrics:
 - Open rates
 - Click-through rates
 - Conversion rates
 - Regularly adjust strategy based on performance data

Communication Frequency

- Establish a [consistent](#) but not overwhelming schedule
We recommend:
 - 2 blogs/month
 - 4 emails/month
 - 18 Social posts/month:
 - 9 on Observances and Lifestyle Topics
 - 9 on Financial Topics
- Avoid sending [multiple communications](#) on the same day
- Respect audience communication preferences



Ask clients in a meeting their preferred communication frequency and method and make a note in CRM



I get thank you calls on the birthday cards sent automatically through my FMG Persona. I've had clients reach out with questions and send notes of appreciation from the monthly newsletters. I don't have time to do the personalized outreach I need to be doing. FMG's marketing team makes me look great!

Mo Rowe
First Financial Group

Free Consultation Offer:

Start transforming your marketing with a free 20-minute consultation. We'll dive into your specific goals and show you exactly how we can help you achieve them – with as much or little effort on your part.

Schedule Now