



Getting the Word Out

You've got a new business...now what?

You'll want to share your excitement about your new business with friends, family and coworkers (basically everyone you know well). We suggest sharing in person, calling, emailing, texting and using social media. If you're going to have an event, make your first introduction an invite. If emailing, texting or using social media, you'll want to share your personal website link.



It's a good rule of thumb to ask people what type of contact they prefer. Some people rarely check their personal email, for instance, and prefer to be called. You'll want to make note of people's preferences on your contact list.

Emailing

Whenever you email, you'll want to prominently share your link and always include it in your email signature.

If you can, it's ideal to personalize each email. The best customer service starts with knowing your customers. Are they recently married? Planning or coming back from a trip? Have a grandchild on the way or a child who's soon to start school or graduate? Knowing those things will help you make personal product recommendations.

To stay on the right side of spam regulations, whenever emailing, you'll want to include something like this at the bottom (provided by Advisor Lisa Hemstreet):

This e-mail is intended as a client service to help keep you posted on new products and events. If you would rather not be contacted by e-mail, please reply with "Remove" in the subject line and I would be happy to remove you from my list. Contacting me directly is the ONLY way to be taken off my e-mail list. Thank you for helping me be a benefit to you and respecting your time.

Lisa also offers: If they request a "remove" I reply with "remove confirmation" in the subject line (so they know I'm not harassing them) and I thank them for



letting me know that they no longer wish to receive e-mails. I let them know that I am here if they ever need me in the future and that I'd love to help them. It's a soft way to let them know that you have received their message and are respecting their wishes.

If you have a large customer list you will contact frequently (or wish to build one), we would suggest using one of the free and/or inexpensive email services available. Here is an article highlighting some of the most recommended.

<http://upcity.com/blog/2013/05/top-25-free-or-low-cost-email-marketing-web-applications/>

If you would like to include images or videos in your emails, you're welcome to use any of the following:

- Images provided in Advisor HQ under Grow My Business
- Product images from the website and Advisor emails
- Pinterest photos: <https://www.pinterest.com/cmgroup/>
- Instagram images: <http://instagram.com/cm>
- CM Facebook posts: <https://www.facebook.com/creativememories>
- YouTube videos: <https://www.youtube.com/user/CreativeMemoriesVids>

Sharing on Social Media

Following/liking/subscribing to the Home Office's social media feeds is recommended. It's a quick and easy way for you to share content with your friends and fans of your business.

Many Advisors use Facebook to promote their business and stay in touch with customers. You will find links in the Advisor HQ to help you set up a page or group in Facebook.

Frequency

How often you communicate with your customers is up to you, though in prior consumer research, most customers report feeling disconnected from their Advisor. Once a month is a minimum, twice a week a maximum. As you're talking with customers you can ask them what they'd prefer and adjust your contact lists accordingly. (Be sure to ask people how they would like to be contacted as well.)



Logo use

You are welcome to use anything the Home Office produces for you (images, flyers, etc.), which may include either the “main” CM logo and/or the CM Independent Advisor logo.

If you create something yourself to market your business, you will need to use one of the Independent Advisor logos provided in the Advisor HQ.

