

Intermediary Marketing Strategy Guide

Workplace Managed Advice

Designing a Successful Opt-In Strategy

Participant education and engagement are paramount in the establishment of a successful opt-in managed advice adoption strategy. Key components of a winning strategy are listed below. NextCapital can support its partners in developing any or all components depending on their needs and current capabilities.

- A plan to capture participant email addresses and plan sponsors' consent-to-contact
- A communication calendar denoting participant touch points and campaign dates
- Efficient contact list-building and ongoing maintenance
- Clear ownership of marketing automation and tooling
- Clear ownership and approval process for content creation and campaign development
- Technological efficiencies in place, such as deep linking for email campaigns, and establishing connectivity between email data and online data to track participants through web applications
- A way to measure, analyze, and report on email campaign success and improvement opportunities
- Additional plan-specific offerings for non-email participant engagement (e.g., webinars, on-site visits)

Designing a Successful Content Strategy

You can generally base your strategy inside the walls of the well-known three-stage marketing funnel:



1. The awareness stage is where you target those looking for answers, resources, education, research data, opinions, and insight.
 - **Content examples in the Awareness Stage include** high-level educational content to help direct them to a solution, like blog posts, best practices, videos, tip sheets, original research, and educational webinars and white papers.
2. The consideration stage is where you target those who are researching whether or not your product or service is the best fit for them.
 - **Content examples in the Consideration Stage include** assets like FAQs, webinars, live interactions, email campaigns, and collateral that touts the features/benefits of your solution.
3. The decision stage is where you target people that are figuring out the steps they need to take to become a customer.
 - **Content examples in the Decision Stage include** granular, more specific collateral like case studies, presentations, demos, pricing, and product literature.

Content for Each Stage of the Funnel

When you develop your content strategy, it's important to address each stakeholder in your value chain and ensure you have tailored content for that audience that relates to where they are in the funnel. Note that certain types of content could apply in multiple stages of the buyer's journey, depending on the product/solution.

Example: Content Mapping

Audience	Collateral Type	Application
Plan Sponsors	White Paper: Value-Add of Managed Advice	Awareness
	Third-party research/articles	Awareness
	Blog posts	Awareness
	Educational webinar	Awareness
	Email drip campaigns	Consideration
	FAQ	Consideration
	Benefits of Managed Advice Flyer	Decision
	Solution Overview Flyer	Decision
	Sales presentation/demo	Decision
	Welcome Kits	Post-Decision (upon go-live)
Participants*	Educational webinar	Awareness/Consideration
	Email awareness campaigns	Awareness/Consideration
	Participant FAQ	Consideration
	Benefits of Managed Advice Flyer	Decision
	Solution Overview Flyer	Decision
	Enrollment guide	Post-Decision

**Content strategy will depend on the plan sponsor's designated method(s) of participant enrollment (e.g., QDIA, auto-enroll, conversion, opt-in, etc.)*