

FACEBOOK SEMINARS

Seminars continue to be an effective and efficient method of prospecting for potential clients. To build awareness and attract people, CreativeOne utilizes Facebook instead of direct mailers to drive qualified prospects at a fraction of the cost. Hey-o, that's good news for you.

These topics are what the people want.

We've taken our seminar topics and revamped the presentations to feature more storytelling and relatable case studies so they're more engaging to the audience.

- Taxes in Retirement
- Retirement Income Planning
- Social Security
- Women and Wealth
- Estate Planning (coming late summer)

They're guaranteed too.

We've restructured our in-person guarantee and it's pretty sweet. You'll receive 100 Business Accelerator Credits (BACs) for every registrant we're short. So say we guarantee 40 registrants, but only get 35, you'll see 500 BACs deposited in your account.

Using our Facebook strategy is going to help you secure more appointments!

What are you waiting for?

Now's the time to get your seminar on the books! Schedule a time with your Marketing Account Manager today to talk seminars and their guarantees!

800.992.2642



Dinner Seminars

SILVER	GOLD	PLATINUM
30 Guaranteed Registrants	40 Guaranteed Registrants	50 Guaranteed Registrants
\$1,199 Package Cost	\$1,899 Package Cost	\$2,399 Package Cost



Workshops

SILVER	GOLD	PLATINUM
15 Guaranteed Registrants	25 Guaranteed Registrants	35 Guaranteed Registrants
\$1,899 Package Cost	\$2,399 Package Cost	\$2,799 Package Cost



www.creativeone.com | 800.992.2642
11460 Tomahawk Creek Parkway, STE 200, Leawood, KS 66211

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*Guaranteed number is based on total registrants, not individual households. Minimum target audience numbers apply for full guarantees. Reduced guarantees for areas below minimum audience size threshold. Talk to us for full details. MP-1051 - 2021/5/18



presents:

creative^{one}

DIGITAL WEBINAR PLAYBOOK

Grow your business in a virtual world

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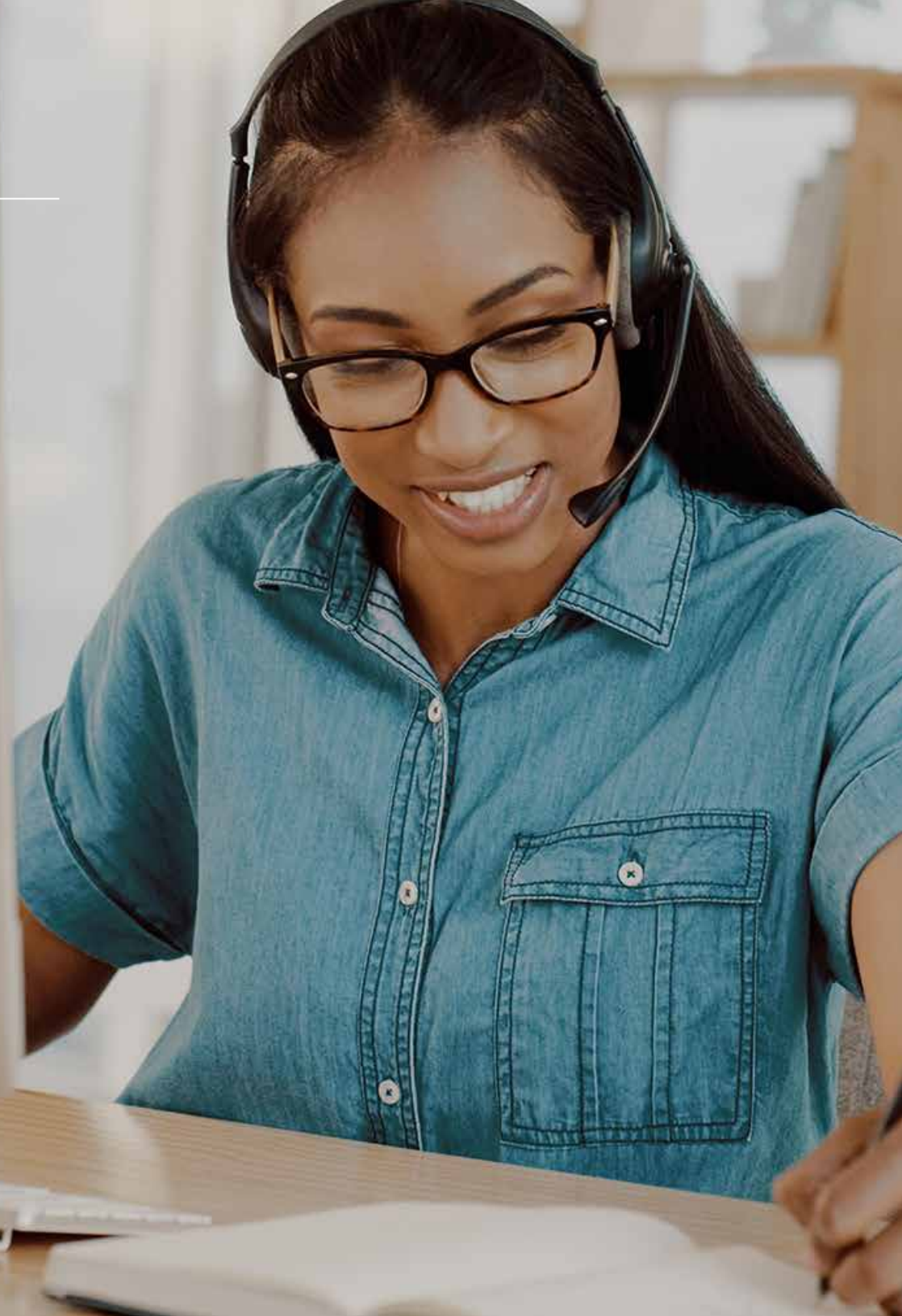
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Welcome to the **new normal**

Remember January 2020? It feels like a decade has passed since then! One thing's for sure, any clear vision or set plans you had for the year went out the window months ago. All we can do now is accept, adapt and move forward.

It's time to regroup and proactively tackle how to market to and communicate with your clients and prospects in our new, more virtual world!

Tech adoption and innovation are essential. Throughout history, worldwide crises have often led to great leaps forward in our use of technology. The current pandemic is no different. Technology keeps us connected and helps businesses remain resilient in challenging times.

Online communication is where it's at ... even among retirees. From video chatting with grandkids to keeping up with the neighborhood via Facebook, online platforms have fast become a preferred method of interacting for an aging population. They've gone digital, and they like it.

Trust matters more than ever. In a world turned upside down, your clients, prospects, and community need to trust that your practice has their best interests in mind. It shows when you embrace flexible, safe and simple new channels of communication that put your audience first.

Virtual client and prospect events are the way forward. We are on a wild ride, with some communities opening (then closing again) like a revolving door. One thing is certain: even as traditional ways of marketing and doing business re-emerge, digital marketing and virtual client interactions aren't going away.

The good news? CreativeOne has your back.

We live for this stuff!

We have the **digital strategies** to keep you going

Lucky for you, at CreativeOne we leveraged our deep bench of marketing, technology and practice management experts to develop turnkey strategies to help grow your business—even in the midst of a global pandemic and cross-country shutdowns.

We wasted zero time pivoting strategies in this new environment and charting a path forward for our advisors. Our internal taskforce of marketing and industry veterans began meeting pre-lockdown to brainstorm, develop, test, tweak and launch innovative **strategies to minimize lead generation disruption for you, while growing your practice.**

Simultaneously, our IT experts began auditing various technology platforms, putting each through rigorous tests to determine the best one for security, ease of use and effectiveness. In the end, one tactic rose to the top that checked all the boxes and delivered real lead generation results:

Digital Webinars



Digital Webinars: reach clients and prospects where they are

What are Digital Webinars?

Digital webinars are an effective alternative to in-person events, conducted online as seminars for new prospects, group meetings for current clients, or pre-recorded content for an on-demand audience.

How do they work?

With just one click and no software download needed, the viewer can watch your presentation, broadcast in high-quality video and audio. They can communicate with you in real-time via the chat box and can customize their experience by choosing to use their own web camera or not.

Though studies show tech adoption among the over 60 crowd is booming, this may be new territory for some clients and prospects.¹ We've kept this in mind in developing **the most simplified, consumer-friendly digital webinar technology and experience possible.**

The benefits to you

Digital webinars are an excellent strategy to keep your lead pipeline flowing and current clients engaged. They also offer significant advantages to you by way of logistics, planning and cost. Digital webinars allow you to:

- Assemble an audience at a nearly 50% lower cost, with no meal cost or location fee necessary.
- Schedule 1-on-1 appointments more easily.
- Save time. Webinars require **two weeks less lead time** than in-person seminars.
- Access and use compliance-approved content.
- Reach a broader audience by removing location barriers, opening your practice up to new consumers you previously thought unreachable.

¹How COVID-19 Has Impacted Media Consumption, by Generation (<https://www.visualcapitalist.com/media-consumption-covid-19/>)

Why work with CreativeOne?

Who are we?

CreativeOne is an industry-leading diversified financial services organization focused on delivering five-star advisor solutions. Today, we accommodate thousands of insurance and financial professionals nationwide by providing innovative products, trendsetting lead-generation and award-winning marketing.

We've been in the business since 1984, and we're made up of 150+ talented and experienced professionals who hold deep roots in the industry and do business in all 50 states.

Innovation is what we do

Thanks to our company culture that fosters innovation, and our team who makes great ideas happen, the CreativeOne machine was ready when the pandemic impact hit. We reimagined how our advisors could best do business in this new normal and how we could make it as effortless for you as possible to not only generate leads, but convert **quality prospects who are ready to purchase** and become clients.





Our Digital Marketing team was made for this!

Transitioning our advisors to digital webinars was much easier and efficient compared to our IMO competitors due to a few critical advantages in how we work:

- A robust digital infrastructure, including proven online ad strategies.
- A strong, responsive partnership with the mighty lead-generator Facebook (when you spend millions each year, your calls get answered!).
- Efficient, easy-to-implement tools like the CreativeOne leads dashboard.
- A marketing team with decades of experience in the financial services industry, top-notch ad agencies, Fortune 500 companies and small businesses.
- Certified digital marketing experts engaged to refine new strategies.
- An in-house compliance team to review and approve our digital content.



CreativeOne does
the heavy lifting
— for you

We want your clients and prospects to have the best possible webinar experience. That's why we deliver **best-in-class technology and expertise** to help you run your webinar campaigns seamlessly and with little effort on your part.

- Fewer clicks and **no frustrating software downloads** for attendees.
- Mobile-friendly, so people can **join from any device anytime, anywhere.**
- **Just click, launch and present.** Our Webinar Concierge Process handles all webinar set-up for you by uploading your presentation, polls, call-to-action offer and answering any questions you have prior to your webinar.
- We provide an **array of helpful pre-webinar tools** like presenter training and easy appointment booking via Calendly.
- **Engage attendees and drive action** with interactive polls, pop-up CTAs and automated webinar surveys.
- **We'll supply the content, too!** You can pick one of our ready-to-go presentations or use your own content. Our webinars tackle the financial topics clients are asking for, include helpful speaker notes, and wrap up with a personalized call-to-action.

With our help, you'll be a webinar all-star in no time!

These hot topics are currently in demand:



Taxes & Retirement



Social Security



Retirement Income Planning



Estate Planning



Women & Wealth

CreativeOne saved our marketing lives! When we saw what the virus could become, we did not hesitate and contacted CreativeOne to explore our options. With their help and expertise, we were able to get the technology rolling very quickly to enable us to teach, meet and write business online. We are having our best year ever! We may never go back to the old ways.



Mark F. - Atlanta, GA

Explore the possibilities

Facebook Webinars

Leverage the power of Facebook and CreativeOne's proprietary targeting to generate high-quality, sales-ready leads for your firm.

Pricing/Packages

GOLD

\$1,999

Package Cost

PLATINUM

\$2,999

Package Cost

Webinar package includes: Webinar Technology Platform, Custom Landing Pages, Custom Facebook Ad Campaign, Email and Text Message Automation, Post Webinar Survey & Follow-Up, Confirmation Calls, Leads Dashboard Access and more!



Barry B. - San Diego, CA

We have been working with the marketing team on virtual Facebooks since the onset of the pandemic threw our traditional workshops into disarray in March. The support and the process that the CreativeOne team has developed have been a godsend to our advisors across the country. Most amazing is how they were able to respond so quickly to the challenges presented by the shut-down of traditional live events. Within days we had a viable solution that we have been using ever since. The technology and the process from planning to execution have been flawless and they continue to innovate and improve it daily. Our advisors have benefited from CreativeOne's digital webinar campaigns and the greatest testament to the usefulness is the rate of repeating is almost 100%.

Gold Case Study

85
registrants

54
webinar views
(63.5%)

15+
appointments

Average of
\$2.7M
of assets
per Evergreen campaign.

Evergreen Webinars

Take advantage of a pre-recorded webinar to generate new prospects 24/7, letting them view your presentation on demand at their convenience, then schedule an appointment.

Pricing/Packages

SILVER	GOLD	PLATINUM
30+ Generated Leads	40+ Generated Leads	50+ Generated Leads
\$2,999 Package Cost	\$3,999 Package Cost	\$4,999 Package Cost

Client/Prospect Webinars

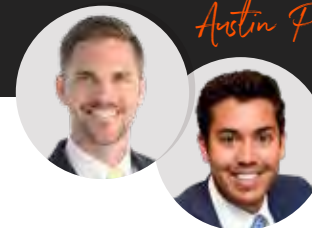
Pricing/Packages

Webinar package includes:
Webinar Technology Platform,
Content, Registration Page,
Email Invites, Webinar Concierge
Services and more!

\$325
Package Cost

"The Evergreen platform has given our firm an outlet to automate our webinars. By pre-recording our presentations, attendees can choose from one of four daily options to watch, giving them much more flexibility than a pre-determined webinar date. We will continue to use Evergreen Webinars once in-person workshops return. You can play golf and capture leads at the same time!"

Austin P. & Alex C. - Charlotte, NC.



Your webinar timeline & tactics

Once you choose your webinar option and set a date, a series of well-orchestrated steps are put into motion.

Campaign assets sent to you and our compliance team for approval

CreativeOne creates a full campaign around your selected topic

We conduct advertising campaign targeting focused on specific financial demographics

Contact your Marketing Account Manager (MAM)

MAM sends you a questionnaire for webinar details

CAMPAIGN ASSETS INCLUDE:

- ✓ ad creative - messaging and imagery
- ✓ campaign buildout and media buy on Facebook
- ✓ landing page with registration form
- ✓ registration submission page
- ✓ Facebook campaign management and optimizations
- ✓ automated pre-webinar email series
- ✓ automated pre-webinar text reminder
- ✓ confirmation calls
- ✓ post-webinar survey
- ✓ portal to manage registrant information & survey responses

We use modeled behavioral indicators to help you get in front of your ideal client.

We'll send you a link to view your registrants on the portal

Webinar Day!

Post-webinar attendee survey sent

Once the campaign is approved on both sides, it launches

Automated email and text reminders sent

Post-webinar nurture campaign implemented

Game on



Best practices to help you ace your webinar

If digital webinars are new territory for you, and you feel a little uneasy about taking the virtual stage, we have some helpful tips and reminders.



Practice, practice, practice. Giving a virtual presentation with no audience is new and different. Do some dry runs online with family and friends to get comfortable before the big day.

Sound check! Your technology is important. Make sure you have access to a good web cam, microphone and reliable, high-speed internet. Plus, a quiet room!

Consider your surroundings. Give yourself some depth behind you, and don't get too close to the screen. Position the camera higher than your eye level. Ensure the lighting is adequate and flattering.

Engage the audience. Be sure to interact with consumers throughout the webinar. It's easier to walk away from a virtual presentation, so keep them dialed in.

Set expectations. Make sure you let them know there will be an opportunity to schedule an appointment. Tell relatable stories and give examples of other people you've helped.

Be human. We're all in this together. Everyone's lives have been impacted by the pandemic, so show empathy and care. Be flexible and give people options to set up one-on-one meetings with you virtually or in person.

Follow up. Think of your webinar as starting the conversation. Be sure to follow up with attendees afterward to answer any questions and continue to build the relationship. For early-day webinars, we recommend follow up later that same day. For evening webinars, follow up the next day.

Check out more of our best practices here:

www.creativeone.com/webinar-best-practices

Let's do this!


Time to get back in the game

You won't build new and existing client relationships by sitting on the sidelines. It's time to dust off your microphone, adjust your web cam and get back to generating a steady stream of new business with CreativeOne's Digital Webinar offerings!

Talk to your CreativeOne Marketing Account Manager today to get started, and put those Business Accelerator credits to excellent use.

Not contracted? No worries. Our digital webinars are available at the lowest cost possible to you—without ridiculous service markup margins. Reach out to your CreativeOne Sales Team to take the next step.





Your success
is our success.

We have a vested interest in bringing you the most effective marketing strategies possible to grow your business. Join top-rated financial services peers who aren't letting a global pandemic slow them down. You, too, can take advantage of industry-leading, high-touch professional services and results-driven lead generation.

TALK TO US!

creative¹ne
DIGITAL
WEBINAR
PLAYBOOK

www.creativeone.com

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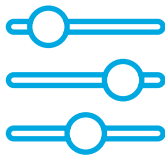
Retire for L.I.F.E.™

a comprehensive, two-session workshop

A series of retirement accounts set up is not a plan, and it's time prospects understood the difference. With Retire for L.I.F.E., they get a true plan, and you get more than just a presentation. This is a full sales and buyer conditioning process hosted at a college, university or community center where you charge attendees tuition. Unlike other IMO programs, we show you how to fill the seats, how to present the info and teach you the software to implement the plan.

THE BENEFITS

As the leader of this course, you'll be positioned as a trained resource. You'll advise pre-retirees and retirees in all areas of retirement planning, including:



L. Liquid

Covering basic living expenses and major upcoming purchases.



I. Income

Ensuring they have resources for guaranteed income.



F. Future

Protecting them from future market volatility and risks.



E. Estate

Providing a lasting legacy for their loved ones.

Give them the confidence to retire once; to **RETIRE FOR L.I.F.E.**

CALL 800.992.2642

to hear more about how Retire for L.I.F.E. could be the next big thing for you—and your bottom line.



Attendees pay a tuition fee for the workshop, so they are highly interested in the topic. They leave feeling confident in their planning strategy and you're viewed as a trusted resource who knows what they're talking about. A win-win.

WHAT'S INCLUDED

- 5+ hours of content to present as you wish (including webinar options for versatility).
- Presentation and sales process training from founder Matt Schuller.
- Complimentary integration with CreativeOne tools.
- Direct mail piece for you to personalize with your name, short bio and business information.
- Personalized marketing and workshop assets, including a presentation, workbook, and supplemental handouts.
- Facebook advertising.
- Adaptable presentation that can be used in multiple settings.
- Opportunity to connect with local HR departments.
- Post-seminar evaluation survey to capture feedback.
- Personalized registration landing page on RetireforLife.com.

COST

\$1,000 set up fee

BONUS: For a limited time, we are waiving the fee because we believe in the potential of this program so much.

Help prospects think outside the box when it comes to retirement planning. Encourage them to take control of their financial future and ensure their plan combats the most common retirement risks they'll face.

Give them the confidence to retire once; to **RETIRE FOR L.I.F.E.**

CALL 800.992.2642

to hear more about how Retire for L.I.F.E. could be the next big thing for you—and your bottom line.



SITEONE

PERSONALIZED
STRESS-FREE
cutting-edge

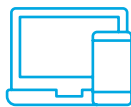
Prospects search online for you—that's often the first thing they do when they hear your name. Does your website represent you and your brand or is it hopelessly out of date? You need a fresh, cutting-edge website to succeed in this business. If you don't have one, you're behind. With **SiteOne**, our team will craft your story and develop a responsive website you can be proud to show clients and prospects.



Our websites are ...



SEO and speed optimized.



Responsive.
Layout based on the device used (ex: desktop, tablet, mobile).



Functionality driven. Multiple integrations to move information between apps automatically.



Beautiful, with modernized templates designed to drive business objectives.

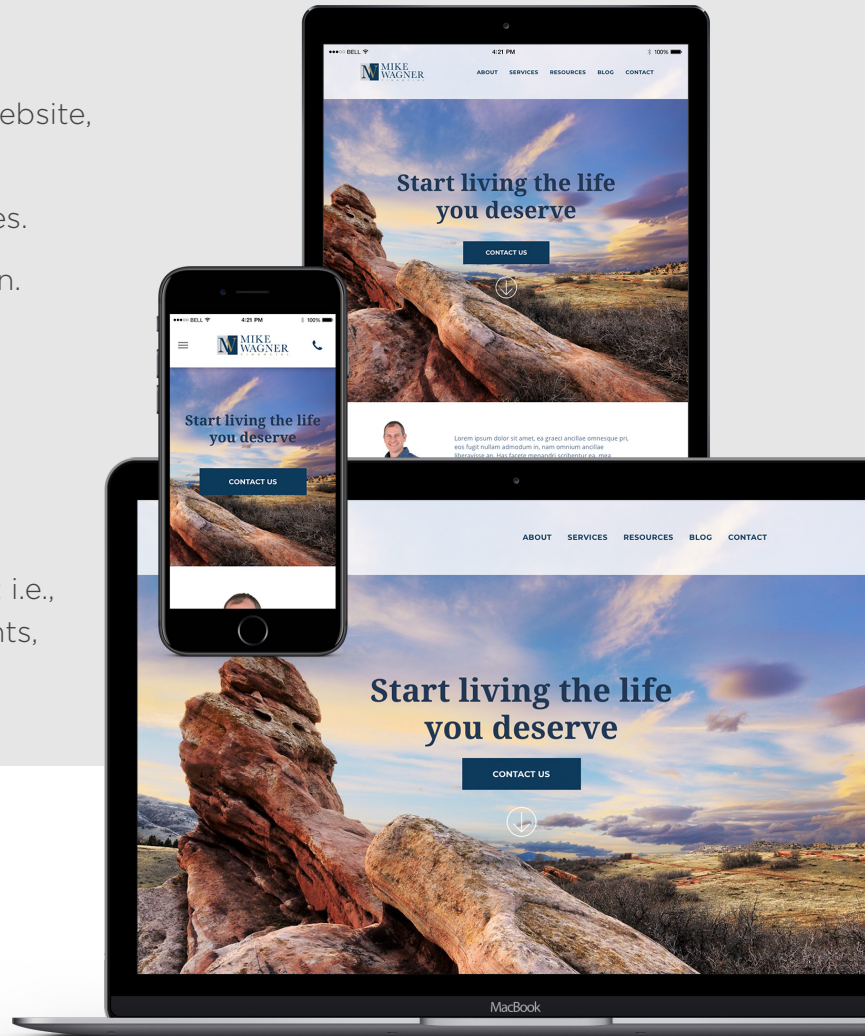


Personalized for your firm.

SITEONE

WHAT WE INCLUDE

- Choice of a variety of designs + set up of website, which includes your branding.
- Professionally written pages and biographies.
- One custom white paper for lead generation.
- Linking of social media accounts.
- Indexing and publishing of site.
- CreativeOne's SEO Local Spark.
- Hosting included - no monthly fees.
- Customized templates with building blocks: i.e., featured media placements, upcoming events, timely lead generation, calls to action, etc.



PRICING

SiteOne Service

\$2,000

Business Accelerator credits

Custom SiteOne Service

\$3,000+

Business Accelerator credits
(ask for quote)

Ask your Marketing Account Manager for the questionnaire to get started and let's build your brand online!

Call us today at
800.992.2642

creativeone
diversified financial services

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