GETTING THE WORD OUT ABOUT YOUR BUSINESS

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, use your first conversation as an invite. If emailing, texting or using social media, you’ll want to share your 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. 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.

For easy sending of your link, you can use the email feature right below your link (on the My Links page) to send an email to yourself, then personalize to send to customers. We do not recommend using it to send directly to customers.

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 in your emails, you’re welcome to use any of the following:

- Images provided in the Advisor back office under Marketing Tools: http://www.creativememories.com/affiliates/marketing/
- Product images from www.creativememories.com
- Pinterest photos: https://www.pinterest.com/cmgroup/
- Instagram images: http://instagram.com/cm
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/fans of your business.

Many Advisors use Facebook in particular as a way to promote their business. You will find two documents on the Marketing Tools page in the Advisor back office to help you with Facebook: Setting up your Facebook Fan Page and Facebook Fan Page Tips and Tricks.

Emailing products
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?

The product email feature on the website (shown right) is one way to let customers know you’re thinking of them and anticipating their needs, and it is THE way to share a product so people automatically come through your link.

1. Login to your Account first so the site knows you’re an Advisor.
2. Go to the product page of the product you’d like to share
3. Click the envelope icon to the right of Add to Cart.

Fill out the Email to a Friend form (be sure to include a personalized message) and click Send. The first time you use this feature, you’ll want to send an email to yourself so you can see what people will receive.

The site lets you email up to five people at a time, though you can do it multiple times. We would suggest emailing one person at a time so you can personalize each message. Or better yet, you can send one to yourself, then personalize and forward to customers.

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 only the Independent Advisor logo, provided in the back office on the Marketing Tools page.

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