



RETIREMENT  
PLAN  
MARKETING

Powered by  
401(k)Marketing

# QUARTERLY CONTENT MARKETING CALENDAR

**Streamline your 401(k)  
content** with an easy to follow,  
12-week marketing calendar.



Your **content marketing calendar**, week-by-week, and step-by-step to consistently keep you in front of your retirement plan prospects, clients, and centers of influence. Share your 401(k) content on your website, social media profile, email, direct mail, and more to promote your retirement plan experience and your firm as a trusted source.

SUGGESTED **SEND** TIMES  
FOR **EMAIL** MARKETING:

7:00 to 8:00 AM

## WEEK

# 1

**Download** Retirement Plan Marketing materials from portal or develop our own content. Customize to your firm with logos, contact information, and disclosures.

**Post** weekly social media posts

## WEEK

# 2

**Submit** all materials to compliance. Then complete any edits necessary. Now that all materials have been approved by compliance, it's time to share them.

**Schedule** all content by social media schedulers, email automation, etc.

- For help scheduling social media posts, check out our helpful [How-to Videos](#) on the Support webpage

**Prep** Direct Mailer

**Post** weekly social media posts

## WEEK

# 3

**Post** a blog article on your website and social media profiles.

SUGGESTED SEND DATE: **TUESDAY**

**Send** a Corresponding Email that promotes your blog via your preferred email marketing program.

SUGGESTED SEND DATE: **WEDNESDAY**

**Post** weekly social media posts



SUGGESTED **POST** DAYS AND  
TIMES FOR **SOCIAL MEDIA**:

<b>TUESDAY</b>	8 AM	12 PM
<b>WEDNESDAY</b>	9 AM	5 PM
<b>THURSDAY</b>		6 PM

WEEK

4

**Send** a Follow-up Email via your preferred email marketing program to engagement contacts.

SUGGESTED SEND DATE: **MONDAY**

Post weekly social media posts

WEEK

5

**Post** a blog article on your website and social media profiles.

SUGGESTED SEND DATE: **TUESDAY**

**Send** a Corresponding Email that promotes your blog via your preferred email marketing program.

SUGGESTED SEND DATE: **WEDNESDAY**

**Post** weekly social media posts

WEEK

6

**Send** a Follow-up Email via your preferred email marketing program to engagement contacts.

SUGGESTED SEND DATE: **MONDAY**

**Post** an infographic on your website and social media profiles.

SUGGESTED SEND DATE: **TUESDAY**

**Send** a Corresponding Email that promotes your infographic via your preferred email marketing program.

SUGGESTED SEND DATE: **WEDNESDAY**

**Post** weekly social media posts



**Don't forget to follow-up with LinkedIn connections** who engage with articles, infographics, and social media posts!

## WEEK

# 7

**Send** Follow-up Email via your preferred email marketing program to engagement contacts.

SUGGESTED SEND DATE: **MONDAY**

**Post** a blog article on your website and social media profiles.

SUGGESTED SEND DATE: **TUESDAY**

**Send** a Corresponding Email that promotes your blog via your preferred email marketing program.

SUGGESTED SEND DATE: **WEDNESDAY**

**Post** weekly social media posts

## WEEK

# 8

**Send** Follow-up Email via your preferred email marketing program to engagement contacts.

SUGGESTED SEND DATE: **MONDAY**

**Post** quarterly Newsletter on your website (social media profiles optional).

SUGGESTED SEND DATE: **TUESDAY**

**Send** a Corresponding Email that promotes your Newsletter via your preferred email marketing program.

SUGGESTED SEND DATE: **WEDNESDAY**

**Post** weekly social media posts

## WEEK

# 9

**Send** Follow-up Email via your preferred email marketing program to engagement contacts.

SUGGESTED SEND DATE: **MONDAY**

**Send** Direct Mailer

**Post** weekly social media posts



SUGGESTED **STRATEGIES**  
FOR FOLLOWING QUARTER:

**Refer to previous relevant content** as “Recent Featured Articles” in email campaigns

WEEK

10

**Post** an infographic on your website and social media profiles.

SUGGESTED SEND DATE: **TUESDAY**

**Send** a Corresponding Email that promotes your infographic via your preferred email marketing program.

SUGGESTED SEND DATE: **WEDNESDAY**

**Post** weekly social media posts

WEEK

11

**Post** a video on your website and social media profiles.

SUGGESTED SEND DATE: **TUESDAY**

**Send** a Corresponding Email that promotes your video via your preferred email marketing program.

SUGGESTED SEND DATE: **WEDNESDAY**

**Post** weekly social media posts

WEEK

12

**Send** Follow-up Email via your preferred email marketing program.

SUGGESTED SEND DATE: **MONDAY**

**Review** all correspondence from email marketing program, LinkedIn posts, and any new website traffic.



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CALENDLY: <https://calendly.com/sasharpm/30min>

## How do you eat an elephant? One bite at a time!

### The same rings true for marketing – it takes time.

Consistency is key for developing and distributing content, following our calendar will put you on the right track to stay in front of clients, prospects, and centers of influence.

All of the materials and calendar are designed to help you market your retirement plan services intelligently, so you can reach more plan sponsor prospects. When you deliver relevant plan sponsor content, you add value to your conversations and can work your way up to become known as the “go-to” retirement plan advisory office.

If you weren't able to complete all of these items in the calendar, we recommend distributing an amount of content that you are comfortable with and what works for your firm's workflow. Because some marketing is better than no marketing.

If you have questions, feedback, or suggestions about the marketing portal, we'd love to hear from you! For more support from our dedicated Relationship Managers, we're here to help:

Professional marketing materials that help retirement plan advisors market to plan sponsors to increase awareness, influence, and your retirement plan business. **Fresh, timely, and relevant delivered to you each quarter! Next quarter coming soon, Q2 2019**  
**Portal Update: April 1, 2019**