PART 11

Marketing and Branding

Chapter 1: Marketing versus Branding

Section 1: What is Brand?

A brand represents the values, benefits, and culture that define a company or individual. Transcending a logo, store front, and features, successful branding and brand recognition will tell individuals on the *outside* what makes a business tick on the *inside*. A brand is the soul of a business and refers to the perception customers have about your product or service.

Section 2: What is Marketing?

Marketing is based on thinking about the business in terms of customer needs and their satisfaction. Marketing has less to do with getting customers to pay for your product as it does developing a demand for that product and fulfilling the customer's needs. As Dr. Philip Kotler explains, marketing is “the science and art of exploring, creating, and delivering value to satisfy the needs of a target market at a profit.”

Section 3: The Marriage of Branding and Marketing

Simply put, Marketing is a *push* and Branding is a *pull*. Marketing is building awareness and Branding is strategy and tactical goals. While marketing methods evolve with the change in technology and consumer habits, branding remains the same since core principles and values rarely fluctuate. A business needs to be aware and thoughtful about these two concepts since they work together to build business and client engagement.

Section 4: What is our Brand Strategy?

A brand and brand strategy can easily fall into a grey area of confusion and indifference. In order to avoid that dilemma, we have broken down what makes up a successful brand into 6 key areas:

1. Purpose: This is the main driver for any business, but it is an important piece to the overall Pickler Companies puzzle. This is what connects us to our clients and makes us identifiable! Why do we come to work every day and how are we portraying our services as indispensable?
2. Consistency: It is paramount to make sure everything we do – from our everyday client service to the photos we use on Facebook – aligns with our brand. For example: PWA is blue, TPLF is platinum, PAA is red, PE is pink and PC is black. Are we making sure we stay consistent and true to everything we do? We must not confuse our clients and potential clients. Harmony is key!
3. Emotion: For our brand to succeed, we must make our clients feel connected to us on an emotional level, as if they are part of our family. When a client feels close to us on a deep level, their trust for us (which is hard to earn and easy to lose) grows.
4. Flexibility: Consistency is important, but we also must remain flexible with the ebb and flow of the younger generations. Are we reaching out to children and grandchildren of current clients? This means premier customer service on all levels, inviting key people to our events, and using our social media channels and email campaigns as tools to harness the younger individuals.

5. Employee Involvement: We must train staff to match the overall tone of our brand. If we are friendly, quick to respond and helpful on social media, are we matching that "voice" in office interactions?
6. Stay Ahead of the Curve: It is important to see what our competitors are doing, and to stay a step ahead of them. It should not dictate our next move, but it should also be a tool we utilize to gain clients that could go elsewhere.

Section 5: The 3 R's

Our marketing strategy is a simple 3-step process:

- Retain: Keep our current client base by providing service excellence.
- Refer: Encourage client referrals -- meaning clients telling their peers about us -- through premium service. Our goal is to create "Raving Fans."
- Replicate: Repeat the process.

Section 6: Why, How & What: Defining our Business

Pickler Companies uses Simon Sinek's "Start with Why" concept to further understand why we exist professionally, and how we can better serve clients through knowing the Golden Circle of WHY, HOW and WHAT.

- WHY: The WHY is the reason we do what we do, both personally and professionally – it is the purpose that drives our organization. People don't care what we do, they care why we do it. Discovering the WHY injects passion into our work, and it's those who start with WHY that have the ability to inspire those around them. As soon as a company's WHY is put into words, the culture becomes a little more tangible and the right decision becomes clear immediately.
  - Our WHY is, "we exist to be significant in people's lives by helping them achieve their dreams, supporting them through life's challenges."

- HOW: The HOW is the collection of things we do as a business to make us stand out from the crowd.
  - Our HOW is, "we bring together the resources of our wealth advisory firm, law firm, and accounting firm to supply clients with superior advice and counsel for life — all under one roof ."

- WHAT: The WHAT is our list of products and services we offer our clients.
  - Our WHAT is, "we supply clients with world-class service in Life Planning, Portfolio Management, Strategic Asset Allocation, Income Strategies, Insurance Needs Analysis, Estate Management, and Tax Planning."

Chapter 2: Community Outreach

Section 1: Pickler Truck/Rental Process

- Pickler Companies offers a Pickler Branded U-Haul truck that it offers to clients

- Upon receiving a Client Request, Direct Client to the Online Registration Form

    - The website where they will find the brief application is https://www.picklercompanies.com/truck-rental
    - Once they have filled out the application, an email – with all of the details associated with the request – will be automatically sent to the Receptionist and the Chief Branding Officer (CBO.)
    - Please Note: This free service is primarily used for individuals and non-profits who are using the truck as a way to give back to the community.
    - THE PRESIDENT IS THE ONLY INDIVIDUAL WHO MAY GIVE APPROVAL ON TRUCK USAGE

- Once the Application has Been Received
    - Once the Receptionist has received the request via email, she is to notify the President

- Once the application has been approved
    - If the President approves the request, the Receptionist will reach out to the individual with confirmation
        - The Receptionist will ask the individual if they need a dolly/hand truck
    - The Receptionist then inputs the dates/times the truck will be out on the Master Calendar
        - The Receptionist is to invite the CBO to the Outlook calendar event
    - The Receptionist then alerts the CBO of the date on which the truck needs to be pulled up to the front of our office (and if the driver needs a dolly)

- On the scheduled pick up day before the client arrives
    - The CBO is to pick the truck up from Chaney and drop it off in front of PWA
        - The key(s) are located in the back "bedroom" closet of Chaney on a key hook
        - If the driver requested a dolly/hand truck, the CBO is to load it in the back of the truck
        - Once the vehicle is in our parking lot, the CBO is to deliver the keys to the Receptionist
    - The Receptionist is to have the Vehicle Loaner Agreement (VLA) printed out on her desk, ready to sign
        - The VLA is located on the Shared Drive: Communication > U-Haul > Contract
    - Once the individual arrives to pick up the truck, the Receptionist will have them sign the VLA
    - The Receptionist is to alert the individual that we are not responsible for any damages to the vehicle during use and that it is the driver's full responsibility
    - Also, the truck <u>must</u> be returned with a full tank of Unleaded 87 Octane gasoline
    - The Receptionist then hands the keys over to the driver and files the signed VLA

- Once the truck has been delivered back to PWA on the specified date and time, the Receptionist is to alert the CBO that it is ready to be taken back to Chaney

- The CBO is to make sure that the truck has been refueled. Then he is to drop it off in the parking lot behind Chaney, lock the gate, and return the keys back to the key hook in the back closet

Chapter 3: Sponsorships

Section 1: Event Sponsorships

- Communicating with Wholesalers Leading up to Events
  - The CBO is to keep the wholesaler informed on the event in which they committed to
  - If the event in which the wholesaler committed to requires a ticket, wristband or lanyard to gain entrance, the CBO is to set that aside at the Receptionist's desk and alert the wholesaler that it needs to be picked up at their earliest convenience
  - When creating the event invitation (electronic or print), the CBO is to ask the wholesaler if PWA is allowed to use their company's logo for advertising purposes
    - Specific wholesalers have strict rules they abide by when it comes to logo usage
      - If logo usage is not permitted, the CBO is to request if their company name can be used in a simple font (sans artwork.) eg. Fidelity will not allow their logo to be used on print or electronic invites, but we can type "Sponsor: Fidelity" on our materials. They DO allow their logo to be used on our TV during the event
  - If the wholesaler is speaking or presenting at our event, the CBO is to request their materials 2 weeks prior to the event for approval from the President
  - If the wholesaler is providing printed materials or door prizes at the event, the CBO is to arrange shipment so that the items arrive on time prior to the event
  - The CBO is responsible for giving contact information (cell phone, email) to the wholesaler so that they may contact us easily in case they are lost or have questions

- MAKE SURE YOUR EVENT INVITATION IS COMPLIANT WITH COMMONWEALTH
  - For instructions on submitting advertising pieces to Compliance, refer to the chapter Compliance at Commonwealth

- DURING THE EVENT
  - The CBO is responsible for making sure the wholesaler knows where/when to arrive
  - Once the wholesaler is on location, the CBO is to offer a beverage/food and ask if they have any question or need any assistance with A/V
  - The CBO is to remind the President (or whichever leader is speaking at the event) when the wholesaler is to be introduced during the event
    - Wholesalers typically give their introductions/talking points at the beginning of the event

- AFTER THE EVENT
  - The CBO is to connect with the wholesaler *before* they leave to remind them that he will be sending the appropriate reimbursement paperwork in the next 2-3 business days
  - If the wholesaler has any feedback regarding the event or the process leading up to the event, the CBO is to record this and have a debrief session with the President

- Filing Reimbursement Paperwork with Commonwealth
  - Within 2-3 business days following the event, the CBO is to:
    - Log on to Commonwealth's CommunityLink

        - In the search bar at the top, type in "Non-cash"
        - Select the first link that pops up: Non-Cash Compensation Report
        - A pop-up box will appear
        - Click the blue "Non-Cash Compensation Report" link
        - Make sure David Pickler is set at 100%
        - On "type of expense," select "Client Event" from the dropdown menu
        - Enter in the company names of each sponsor for the particular event (these fields will autofill; make sure to select the autofilled suggestion or the form will not submit.)
        - Enter in the amount they are paying towards the event
        - Enter in the type of payment (this is typically "Reimbursement")
        - Select whether or not the sponsor was present at the event (this is typically "Yes")
        - Click "Browse Files" and select the appropriate submission pieces
            - Invitation (which will have been previously approved by Commonwealth at this point)
            - All receipts
            - Guest list for event
        - Click "Submit"
    - Commonwealth will contact you if there is an issue or if they have not received the sponsor's payment after several weeks
- Filing Reimbursement with Sponsor(s)
    - Immediately following the reimbursement paperwork with Commonwealth, the CBO is to:
        - Send an email to the wholesaler. *A template for the email is included in the* Appendix A.
    - Make sure to attach receipts, invitation, guest list, and a letter (if necessary)
    - If the sponsor requires a letter from PWA, there is a template in Appendix A. Print this letter out on our letterhead and sign it
    - Scan it and email it to yourself
    - Attach it along with the receipts, guest list, and invitation

Chapter 4: Client Events

Section 1: Planning Events Out in Advance

- 2 Months Prior to Year-End
    - The Chief Branding Officer (CBO) is to work with the President to create a calendar of events for the coming year
    - CBO then takes the notes from the planning meeting and designs an Event Menu to be used both in-house and for partners
    - CBO is also in charge of creating a physical event calendar for our clients.
        - See Part 11, Chapter 7
    - The summer months (June, July and August) are typically "dead" months where we schedule very few, if any, events due to summer vacations

- 6 Months Prior to Event
    - Event Concept (including which firm is promoting)
    - Working Event Title
    - Approximate Event Date

  - Promotional Items
  - Target Audience
  - Goal (e.g., branding, marketing, client appreciation)

Section 2: Pickler Academy

- 2 Months Prior to Event
  - Contact Potential Sponsor – Provide info (e.g., price, event info, speaking time)

- 1.5 Months Prior to Event
  - Create e-invitation (via Constant Contact)
  - Create invitation list
  - Send invitation to Commonwealth Compliance (see “Compliance” section for instructions)
  - Set meeting with Receptionist and discuss menu and logistics (including nametags, registration cut-off, floor plan, and timeline)

- 1 Month Prior to Event
  - Invitations are emailed or mailed once approved by Compliance
    - We send email invitations to Golds and Platinums first, followed by Greens 3 days later
  - Track and report RSVPs daily (Receptionist)
    - Receptionist is to keep the President up-to-date on registrants
  - CBO to reconfirm details with sponsor (if applicable)

- Three Weeks Out from event
  - Re-email Invitations/ Track and report RSVPs daily (Receptionist)
  - Menu/caterer finalized – we typically use sandwich places that cater (eg. Newk’s. McAllister’s, Firehouse Subs)

- Two Weeks Out from event
  - Resend Invitations/ Track and report RSVPs daily (Receptionist)

- One Week Out from event
  - Call and reconfirm menu/details with caterer/restaurant
  - Inventory drinks at Halle Park Cir. and Chaney locations
  - Resend Invitations/ Track and report RSVPs daily (Receptionist)
  - CBO to reconfirm details with sponsor (if applicable)

- Three Days Out from event
  - Call all attendees to confirm attendance

- Two Days Out from event
  - Purchase any necessary groceries

- One Day Out from Event
  - Go to Chaney to pick up beverage containers appropriate for icing drinks, cups, glasses, dishes, tables, chairs, and any needed beverages (Receptionist)
  - Create nametags

- Day of Event
  - Move the following items to the Production Room: Chess Board and 2 chairs (Large Conference Room), 2 soft chairs, lamp, basketball and case, Western statuette (Receptionist’s office)

- Set up 1-2 card tables and top with round toppers (found in TPLF closet)
  - Place appropriate linens on tables

- Three Hours before Event
  - Arrange food in serving dishes and refrigerate
  - Set table cloths (with plastic protectors underneath) on Receptionist's desk and cabinet
  - Set wine buckets on desk and/or wheel in the wooden cooler if appropriate
  - Ice drinks
  - Bring in garbage can with new bag

- One Hour before Event
  - Set out food
  - Coordinate Caterer Setup
  - Set out nametags
  - CBO tests A/V
  - CBO greets sponsor (if attending and/or speaking) and assists with any A/V setup

- Event Start
  - President or firm partner welcomes the guests and introduces the speaker and/or partner (if applicable)
  - Presentation begins
  - Our lunch and learns typically start at 11:30AM with lunch followed by the presentation at 11:45 or 12:00. The event wraps at 1:00PM.

- During Event
  - Staff monitors/refills food and monitors/empties trash as needed

- End of Event
  - Clean Up (i.e., dump ice, refrigerate food, wash dishes, vacuum, place used linens in Receptionist's office)

- After Event
  - Send the sponsor a copy of the invitation, the attendance, and a receipt that matches or exceeds the commitment along with directions to send payment to Commonwealth,
  - Office Manager/Bookkeeper notifies President and Chief Branding Officer when payment arrives
  - FOR DETAILED INSTRUCTIONS ON SUBMITTING REIMBURSEMENT PAPERWORK TO PARTNERS, SEE "EVENT SPONSORSHIPS"
  - FOR DETAILED INSTRUCTIONS ON SUBMITTING REIMBURSEMENT PAPERWORK TO COMMONWEALTH, SEE "UPLOADING ADVERTISING DOCUMENTS TO COMMONWEALTH COMPLIANCE"

Section 3: Market & a Movie

- 3 Months Prior to Event
  - Contact Malco Theaters (our contact is Karen)
  - Discuss the movie, date and time
  - We typically do evening showings, renting the Collierville theater from 6:00PM – 10:00PM with a max of 70 attendees
  - Book date
  - Malco will send us a contract which the President will sign upon review

        - Email this back to Malco

- 2 Months Prior to Event
    - Create invitation (email invitation via Constant Contact)
    - Send invitation to Commonwealth Compliance (see "Compliance" section for instructions)

- 1 Month Prior to Event
    - Invitations are emailed once approved by Compliance
        - We send to Golds and Platinums first, followed by Greens 3 days later
    - Track and report RSVPs daily (Receptionist)
        - Receptionist is to keep the President up-to-date on registrants

- Three Weeks Out from event
    - Re-email Invitations/ Track and report RSVPs daily (Receptionist)

- Two Weeks Out from event
    - Resend Invitations/ Track and report RSVPs daily (Receptionist)
    - Call and reconfirm date, place, and time with Malco
- One Week Out from event
    - Confirm with Malco the necessary items for the event
        - 1 table, 2 chairs, 1 microphone and access to audio system, the option to refill drinks and popcorn, ask if Adrian will be there to facilitate (he is our usual contact and sets things up for us)
    - Confirm that ScreenVision and previews will play before the movie
    - Create custom lanyards for event
        - We print these in-house (2 per page) and have them trimmed, laminated and hole punched at Office Depot in Collierville
        - Purchase lanyard necklaces if necessary
    - Purchase red raffle tickets at Office Depot if necessary
    - These are used for clients to claim drink and popcorn at concessions

- Three Days Out from event
    - Confirm with all attendees

- One Day Out from Event
    - Print off guest list (with clipboard)
    - Pick up lanyards from Office Depot
    - Gather all necessary items for event
    - Pickler Companies table cloth (housed at Chaney), guest list, lanyards, red raffle tickets, pens and highlighters

- One Hour before Event
    - Arrive at Malco with items listed above
    - Registration table and 2 chairs will be set up by Malco staff in the lobby
    - Set up registration list with pens and highlighters
    - Set out lanyards and raffle tickets
    - If the sponsor provided any materials or giveaways, set those up
    - Test out audio in theater with microphone

    - Confirm that ScreenVision will play as guests take their seat and that previews will play before the movie begins

- Event Start
    - Using the guest list, check in clients as they arrive (who came/who no-showed)
    - Hand each guest a lanyard, raffle ticket and any appropriate materials, and direct them to the concession stand and which theater we will be in
    - The President enters the theater, once all are seated, and welcomes the guests
    - If there is a speaking sponsor, David introduces them after his welcome message and they speak for 5-10 minutes
    - Following the presentation, the President hands the CBO the microphone which should now be turned off
    - The CBO turns off the lights as the President takes his seat (the switch is located behind the aisle drapes)

- During Event
    - The CBO returns the microphone to the manager and pays for the events using a company credit card
    - Occasionally, the sponsor prefers to pay for the event at this time v. reimbursement
    - The CBO requests and itemized receipt for filing and takes his seat
    - Staff may stay to watch movie

- End of Event
    - 1-2 staff members are at the theater entrance to gather lanyards
    - Clean Up (gather all items from registration table)

- After Event
    - Send the sponsor a copy of the invitation, the attendance, and a receipt that matches or exceeds the commitment along with directions to send payment to Commonwealth,
    - Office Manager/Bookkeeper notifies President and Chief Branding Officer when payment arrives
    - FOR DETAILED INSTRUCTIONS ON SUBMITTING REIMBURSEMENT PAPERWORK TO PARTNERS, SEE "EVENT SPONSORSHIPS"
    - FOR DETAILED INSTRUCTIONS ON SUBMITTING REIMBURSEMENT PAPERWORK TO COMMONWEALTH, SEE "UPLOADING ADVERTISING DOCUMENTS TO COMMONWEALTH COMPLIANCE"

<u>Section 4: "Gala" Events (Client Dinner, Whiskey on the Water, Valentine's Day Ladies Luncheon)</u>

- 3 Months Prior to Event
    - Contact Potential Sponsor – Provide info (e.g., price, event info, speaking time)
    - Pick venue if offsite event:
        - Venue Site Visit
        - Confirm available dates
    - Book date
    - Book caterer & get menu options (or Contact Coordinator for menu at Venue)

- 2 Months Prior to Event
    - Create invitation (email via Constant Contact or physical invitation)
    - Create invitation list

- Send invitation to Commonwealth Compliance (see “Compliance” section for instructions)

- 1.5 Months Prior to Event
  - When invitation is approved, get printed if necessary (we use Clark’s Quick Print in Germantown)
  - Set meeting with Receptionist and discuss menu and logistics (including entertainment, nametags, registration cut-off, floor plan of venue, and timeline)

- 1 Month Prior to Event
  - Invitations are emailed or mailed once approved by Compliance
    - We send email invitations to Golds and Platinums first, followed by Greens 3 days later
  - Track and report RSVPs daily (Receptionist)
    - Receptionist is to keep the President up-to-date on registrants
  - Reserve necessary tables, chairs, linens
    - We use Hick’s for rentals, but we have a majority of necessary items at Chaney Cove (bistro tables, folding chairs, linens, wine buckets, coolers, etc.)

- Three Weeks Out from event
  - Re-email Invitations/ Track and report RSVPs daily (Receptionist)
  - Call and reconfirm date, place, and time with caterer/venue
  - Menu and Entertainment finalized

- Two Weeks Out from event
  - Resend Invitations/ Track and report RSVPs daily (Receptionist)
  - Call and reconfirm date, place, and time with caterer/venue

- One Week Out from event
  - Call and reconfirm caterer menu/venue/entertainment
  - Inventory drinks at Halle Park Cir. and Chaney locations
  - Resend Invitations/ Track and report RSVPs daily (Receptionist)

- Three Days Out from event
  - Call all attendees to confirm attendance

- Two Days Out from event
  - Purchase any necessary groceries

- One Day Out from Event
  - Go to Chaney to pick up beverage containers appropriate for icing drinks, cups, glasses, dishes, tables, chairs, and any needed beverages (Receptionist)
  - Offsite event – Pick up Pickler Truck
  - Create nametags

- Day of Event
  - Single Musician should arrive 30 minutes before event
  - Full Band should show up 1 hour before event
  - Offsite Event – Load truck and deliver to venue

- Three Hours before Event
  - Ice drinks in wine buckets and/or barrel buckets and wooden Pickler cooler

    - Arrange food in serving dishes and refrigerate

- One Hour before Event
    - Set out food 1 hour before start time
    - Coordinate Caterer and Entertainment Setup
    - Set up registration table (if appropriate for event)
    - Set up registration list
    - Set out nametags (if appropriate for event)

- Event Start
    - Using the guest list, check in clients as they arrive (who came/who no-showed)

- During Event
    - Staff monitors/refills food and monitors/empties trash as needed

- End of Event
    - Clean Up (i.e., dump ice, refrigerate food, wash dishes, vacuum, place used linens in Receptionist's office)
- After Event
    - Send the sponsor a copy of the invitation, the attendance, and a receipt that matches or exceeds the commitment along with directions to send payment to Commonwealth,
    - Office Manager/Bookkeeper notifies President and Chief Branding Officer when payment arrives
    - FOR DETAILED INSTRUCTIONS ON SUBMITTING REIMBURSEMENT PAPERWORK TO PARTNERS, SEE "EVENT SPONSORSHIPS"
    - FOR DETAILED INSTRUCTIONS ON SUBMITTING REIMBURSEMENT PAPERWORK TO COMMONWEALTH, SEE "UPLOADING ADVERTISING DOCUMENTS TO COMMONWEALTH COMPLIANCE"

<u>Section 5:</u> <u>Bull Talk</u>

- 1.5 Months Prior to Event
    - Create invitation (email invitation via Constant Contact)
    - Send invitation to Commonwealth Compliance (see "Compliance" section for instructions)

- 1 Month Prior to Event
    - Invitations are emailed once approved by Compliance
    - Track and report RSVPs daily (Receptionist)
        - Receptionist is to keep the President up-to-date on registrants
    - When clients RSVP to this event, use the Bull Talk Registration Template found in Appendix A as a response.

- Three Weeks Out from event
    - Re-email Invitations/ Track and report RSVPs daily (Receptionist)

- Two Weeks Out from event
    - Resend Invitations/ Track and report RSVPs daily (Receptionist)

- One Week Out from Event
    - CBO is to compile Market Update materials from Commonwealth and put in a binder for the President to review for the call

    - Community Link > Financial Planning and Research > Market Research & Commentaries

- One Day Out from Event
    - Email registrants a reminder about tomorrow's call along with a refresher on call-in instructions (mentioned in email template above)

- Event Start
    - We use a call-recording service called Arkadin for these calls
        - Using Arkadin
            - THIS CONFERENCE CALL SERVICE IS USED STRICTLY FOR BULL TALK QUARTERLY MARKET CALLS
        - This conference line is always open, so there is no need to go in and schedule a call in the software
        - Simply alert participants via email when the call will take place and send them the following call-in information:
        - Conference Line: 1-866-252-0050
        - Access Code: 44474590#
        - After the conference call has occurred, download the recording by doing the following:
            - Log in to https://commonwealth.anywhereconference.com/
            - Click "I'm a Moderator"
            - Click "Sign In"
            - Select "Recordings" at the bottom-left of the page
        - Checkmark the recording you wish to download and click the green, downward-facing arrow
        - Alternately, the recording will be automatically emailed to the Chief Branding Officer when it is available to download
    - The President then greets the callers and does a role call
    - He then follows these steps:
        - Mutes call - *2
        - Records call - *#5 (press 1 after woman stops talking)
        - GIVES PRESENTATION
        - Stops recording - *#5 then press 1
        - Unmutes call - *2
    - At this point, the President fields questions from the callers

- After Event
    - Arkadin will email the CBO a link to the audio recording when it is available
    - The CBO is to email this audio file to Compliance:
      advertising@commonwealth.com
    - You cannot submit this normal way on Community Link since this is an audio file
    - Once the audio file has been approved, the CBO is to upload it to our website and share the link on social media
    - Refer to the section "Website" for details on how to add the audio file

Section 6: Great Performances

- 2 Months Prior to Event

- Contact Potential Sponsor – Provide info (e.g., price, event info, speaking time)
- Find and book musician(s) – We typically use young jazz artists (Amro is a good place to start)
  - The President must approve the musician

- 1.5 Months Prior to Event
  - Create e-invitation (via Constant Contact)
  - Create invitation list
  - Send invitation to Commonwealth Compliance (see "Compliance" section for instructions)
  - Set meeting with Receptionist and discuss menu and logistics (including nametags, registration cut-off, floor plan, and timeline)

- 1 Month Prior to Event
  - Invitations are emailed or mailed once approved by Compliance
    - We send email invitations to Golds and Platinums first, followed by Greens 3 days later
  - Track and report RSVPs daily (Receptionist)
    - Receptionist is to keep the President up-to-date on registrants
  - CBO to reconfirm details with sponsor (if applicable)
  - CBO to reconfirm details with musician(s)

- Three Weeks Out from event
  - Re-email Invitations/ Track and report RSVPs daily (Receptionist)
  - Menu/caterer finalized – we typically purchase food from Kroger and/or Costco for this event

- Two Weeks Out from event
  - Resend Invitations/ Track and report RSVPs daily (Receptionist)
  - Have piano tuned by Amro (if necessary)

- One Week Out from event
  - Inventory drinks at Halle Park Cir. and Chaney locations
  - Resend Invitations/ Track and report RSVPs daily (Receptionist)
  - CBO to reconfirm details with sponsor (if applicable)
  - CBO to reconfirm details with musician(s)

- Three Days Out from event
  - Call all attendees to confirm attendance

- Two Days Out from event
  - Purchase any necessary groceries
  - CBO creates program, prints in-house and folds with our folding machine
  - CBO creates PPT slideshow featuring the event logo, musician's pictures and sponsor logos

- One Day Out from Event
  - Go to Chaney to pick up beverage containers appropriate for icing drinks, cups, glasses, dishes, tables, chairs, and any needed beverages (Receptionist)
  - The CBO is the have the Office Manager write a check for the musician

- Day of Event
  - Move the following items to the Production Room: Chess Board and 2 chairs (Large Conference Room), 2 soft chairs, lamp, basketball and case, Western statuette (Receptionist's office)
  - Set up 1-2 card tables and top with round toppers (found in TPLF closet)

    - Place appropriate linens on tables

- Three Hours before Event
    - Arrange food in serving dishes and refrigerate
    - Set table cloths (with plastic protectors underneath) on Receptionist's desk and cabinet
    - Set wine buckets on desk and/or wheel in the wooden cooler if appropriate
    - Ice drinks
    - Bring in garbage can with new bag
    - CBO puts the partner/event slideshow up on the TV
    - A program is placed at every spot around the table(s)

- One Hour before Event
    - Set out food
    - Coordinate Caterer Setup
    - Set out nametags
    - CBO greets sponsor (if attending and/or speaking)
    - CBO greets musician(s) and assists them with setup
        - We do not typically use a microphone or amp at these events

- Event Start
    - President welcomes the guests and introduces the speaker and/or musician
    - Sponsor is given the opportunity to briefly speak
    - Performance begins
    - We hold intermission at the half-way point

- During Event
    - Staff monitors/refills food and monitors/empties trash as needed

- End of Event
    - Clean Up (i.e., dump ice, refrigerate food, wash dishes, vacuum, place used linens in Receptionist's office)
    - CBO pays the musician with a check

- After Event
    - Send the sponsor a copy of the invitation, the attendance, and a receipt that matches or exceeds the commitment along with directions to send payment to Commonwealth,
    - Office Manager/Bookkeeper notifies President and Chief Branding Officer when payment arrives
    - FOR DETAILED INSTRUCTIONS ON SUBMITTING REIMBURSEMENT PAPERWORK TO PARTNERS, SEE "EVENT SPONSORSHIPS"
    - FOR DETAILED INSTRUCTIONS ON SUBMITTING REIMBURSEMENT PAPERWORK TO COMMONWEALTH, SEE "UPLOADING ADVERTISING DOCUMENTS TO COMMONWEALTH COMPLIANCE"

Section 7: Event Debrief

- 1 Week After Event
    - An event debrief is to happen no later than 1 week after the event so that it is still fresh in everyone's mind
    - This happens between the President, CBO, and Receptionist

- This is a way to discuss the positives and negatives of the event and how we can better prepare and execute for future events

Section 8: Event Archiving

- Locally
  - As with any event, all documents must be archived on the Shared Drive in the Communications folder
  - This includes, but is not limited to, receipts, guest lists, graphics and invitations

- Commonwealth
  - If you follow the process correctly, all necessary items will be archived on Commonwealth's end
  - This includes invitation and material approval, receipts and sponsor reimbursements

Chapter 5: Digital Outreach

Section 1: My Two Cents

- Developing Content
  - The Chief Branding Officer (CBO) is in charge of communicating with the President on future content for My Two Cents (M2C), creating the newsletter in Constant Contact, and sending it out via the Pickler Law Constant Contact account.
    - Schedule a meeting with the President to create a 6-month calendar of topics
      - This calendar of topics range from current events, events and initiative Pickler Companies is in charge of, and outside activities in which David is involved with.

- Creating the M2C Newsletter
  - Logon to Constant Contact, using the "picklerlaw" account
    - On the most recent My Two Cents email campaign, click "More" on the right and select "Copy" from the dropdown menu
    - Once the new copied campaign opens up, change the header at the top to reflect the new date (e.g. My Two Cents - 6/25/18)
    - In the subject line and preheader fields, update the date accordingly
    - On the red ribbon at the top of the email, update the date
  - Be sure the My Two Cents banner graphic has the correct year on the penny image (e.g. 2018)
    - This can be changed in Photoshop
    - Located in: Shared > My Two Cents > Logo > Logo – 2018.psd
  - Fill in the blocks with appropriate content and images, making sure the pieces are engaging
  - Upload a new "Julianne Pic of the Week" at the bottom block
    - If the President has not sent you a recent photo, contact him
    - Save pictures of Julianne: dpickler(Z) > My Pictures > _Julianne
  - Once you are satisfied with the newsletter, send yourself a proof via email
    - Click "Preview" at the top right of the newsletter-builder, insert your email, and click "Send a Test"
    - Once you receive the email proof, carefully review grammar and layout
  - Once the proof has been personally reviewed, send the President a draft using the steps above (Preview, Send Test)

- Sending out the M2C Newsletter
    - Once the President has approved the draft, use the following steps to send it out
    - At the top of the email draft, click “Continue” at the top right
    - Click the blue plus sign, and select all of the contact lists
    - Make sure “When to Send” is selected for “Send Now”
    - Check to make sure the “Subject”, “Preheader” and “From” are all correct
    - Click “Schedule”
    - Once scheduled, make sure one “Simple Share” option is selected which will send to the President’s personal social media accounts
        - Occasionally, the posts will not share successfully to the President’s Facebook account. If this happens:
            - Go into the “Sent” M2C email
            - Click the “More” dropdown and copy the link
            - Login to the President’s Facebook page
            - Post the link preceded by the My Two Cents topic
            - Select an appropriate image to accompany the post
            - Click “Publish”

Chapter 6: Weekly Market Update

- Receiving the Weekly Market Update from Commonwealth
    - Every Monday at approximately 12:00 PM CST, Commonwealth emails the Weekly Market Update (WMU) to the Chief Branding Officer (CBO)
        - Alternately, this document can be found on CommunityLink
        - Hover over “Financial Planning & Research” and click on “Market Updates” under the “Market Research & Commentaries” header
        - Download both the PDF and MS Word documents under the appropriate date (e.g. Weekly – June 25, 2018)

- Creating the Weekly Market Update in Constant Contact
    - Open the PWA Constant Contact account
        - On the most recent WMU email campaign, click “More” on the right and select “Copy” from the dropdown menu
        - Once the new copied campaign opens up, change the header at the top to reflect the new date (e.g. Weekly Market Update - 6/25/18)
        - In the subject line and preheader fields, update the date accordingly
        - In the body of the email, update the date on the right-hand side
    - Open the WMU <u>Word</u> document (from Commonwealth) in a new window
    - Copy the text from this document and paste it into the Constant Contact email campaign
    - Open the WMU <u>PDF</u> document (from Commonwealth) in a new window
    - Select the Snippet tool and take a screenshot of the Market Index Performance Data
    - Insert the above screenshot into the campaign draft
    - At the bottom of the draft, highlight with your curser the “Download PDF” link at the bottom (above David’s signature)
    - Once highlighted, click on the “Document Link” option on the tope left panel of the page

- Click “Upload a New Document”
- Once you have selected the previously save PDF of the WMU, click “Upload Files” then click “Done”
- Select the document you just uploaded by clicking on the radio button next to the file name
- Click “Insert”
- Scroll to the top of the page and click “Save”
- Proofread the campaign by clicking “Preview” at the top right of the page and send yourself a test email
    - Make sure the subject line reflects the correct date, the “Download PDF” button works, and that the text and charts match the original Word document

- Sending the Weekly Market Update to Compliance
    - It is no longer mandatory to submit the WMU to Compliance before emailing it out since it is pre-approved

- Sending the Weekly Market Update to Clients
    - Once Compliance has granted approval on the campaign, you may now send it to clients and share on social media
    - To send to clients, open up the PWA Constant Contact account
    - Select the campaign by clicking on the title
    - Click “Continue” at the top right of the screen
    - Click the blue “+” icon and select the “Green”, “Gold” and “Platinum lists
    - Double check that the date is correct on the Subject and Preheader lines
    - Double check that the email is coming from dpickler@picklerwealth.com
    - Select “Send Now” on the right
    - Click the orange “Schedule” button at the top right

- Uploading the Weekly Market Update to the PWA Website
    - Open Wix.com
    - Hover over the PWA website image and click on the pencil icon to edit the site
    - Once the editor has loaded, click “Preview” at the top right
    - In Preview Mode, hover over “Resources” and click “Weekly Market Update”
    - Click “Back to Editor” at the top right
    - Once in Editor Mode, click anywhere on the Weekly Market Update list
    - Click “Add and Manage Items”
    - Hover over the top Weekly Market Update and select “Duplicate” on the right-hand side
    - The copied WMU will now appear 2nd in the list
    - Grab the copied WMU by clicking on the grid icon (on the left) and dragging it to the top of the list
    - Click on the newly moved WMU and select “Edit” on the right-hand side
    - In the title field, remove “Copy Of -”
    - In the date field, select the current date
    - In a new window, open the Word document of the original WMU and copy the first bullet point
    - Paste this into the corresponding field in the Wix editor

- At the bottom, click on the last field titled "Where is this linked to?"
- Click "Choose File" and select the PDF file of the WMU
- Click "Done" then "Add to Page"
- Click "Done" once more
- Click the "x" icon at the top right
- Click "Preview" at the top right and make sure it formatted correctly and that the "Download PDF" link works and is accurate
  - Also, click the "Mobile" button at the top and make sure the page looks correct for mobile devices
  - You may need to drag the footer of the page to give/remove "breathing room"
- Once satisfied, click "Publish" at the top right

- Sharing the Weekly Market Update on Social Media
  - SEE "SOCIAL MEDIA" CHAPTER FOR MORE IN-DEPTH INSTRUCTIONS
  - Open Sprout, our social media dashboard
  - Select "Pickler Wealth" from the folder dropdown menu at the top right
  - Click the green "Compose" button at the top right of the page
  - Make sure all 3 social networks are selected (Facebook, Twitter and LinkedIn)
  - In the text field, write a brief message about how our WMU is now available (e.g. Check out our most recent Weekly Market Update!)
  - Insert https://www.picklerwealthadvisors.com/weekly-market-update after the above text
  - On the bottom of the pop-up window you are working in, click the trashcan icon to remove the automated image
  - Now, click the eye icon
  - Select the WMY graphic by going to: Shared > Communication > Social Media > PWA > "Weekly Market Update"
  - Click "Send" from Sprout

Section 1: Commonwealth Materials

- Commonwealth's Pre-Approved Materials
  - Commonwealth houses numerous articles and commentaries on Community Link for our use
  - The Chief Branding Officer (CBO) and Communications Assistant (CA) are responsible for utilizing these documents

- Research Documents and Commentaries
  - To access the RESEARCH & COMMENTARY files on CommunityLink:
    - Hover over "Financial Planning & Research" at the top of the page
    - From there, you will see a host of articles for our use

- Social Media Posts and Articles of Interest
  - To access the SOCIAL MEDIA/WEBSITE posts on CommunityLink:
    - Hover over "My Practice" at the top of the page
    - Click on "Advertising" under the "Compliance" tab
  - For pre-approved social media posts:
    - Click "Website, E-Mail, & Social Media" under the "Social Media" tab

        - From here, you can see a list of status updates (for Facebook and LinkedIn) and Tweets (for Twitter)
            - Status updates and Tweets are identical in content, but the tweets are more abbreviated to accommodate the character limit
    - For advanced instructions on posting these to social media/Sprout, refer to the Social Media chapter

- Weekly Market Update
    - Commonwealth emails their Weekly Market Update publication every Monday to the CBO. Also, this piece can be found on CommunityLink
    - To access the WEEKLY MARKET UPDATE on CommunityLink:
        - Hover over "Financial Planning and Research" at the top of the page
        - Click on "Market Updates" under the "Market Research & Commentaries" tab

- Emailing out the Weekly Market Update
    - For instructions, please see the "Weekly Market Update" section

- Uploading the Weekly Market Update to the PWA Website
    - For instructions, please see the "Weekly Market Update" section

- Uploading Articles of Interest to the PWA Website
    - Open Wix.com
    - Hover over the PWA website image and click on the pencil icon to edit the site
    - Once the editor has loaded, click "Preview" at the top right
    - In Preview Mode, hover over "Resources" and click "Articles of Interest"
    - Click "Back to Editor" at the top right
    - Once in Editor Mode, click anywhere on the Articles of Interest list
    - Click "Add and Manage Items"
    - Hover over the top (most recent) article and select "Duplicate" on the right-hand side
    - The copied article will now appear 2nd in the list
    - Grab the copied WMU by clicking on the grid icon (on the left) and dragging it to the top of the list
    - Click on the newly moved list item and select "Edit" on the right-hand side
    - In the title field, remove "Copy Of -"
    - In the date field, select the current date
    - In a new window, open the Word document of the original Article of Interest and copy the first paragraph
    - Paste this into the corresponding field in the Wix editor
    - At the bottom, click on the last field titled "Where is this linked to?"
    - Click "Choose File" and select the PDF file of the Article of Interest
    - Click "Done" then "Add to Page"
    - Click "Done" once more
    - Click the "x" icon at the top right
    - Click "Preview" at the top right and make sure it formatted correctly and that the "Download PDF" link works and is accurate
        - Also, click the "Mobile" button at the top and make sure the page looks correct for mobile devices
        - You may need to drag the footer of the page to give/remove "breathing room"
    - Once satisfied, click "Publish" at the top right

- Sharing the Article of Interest on Social Media
  - SEE "SOCIAL MEDIA" CHAPTER FOR MORE IN-DEPTH INSTRUCTIONS
  - Open Sprout, our social media dashboard
  - Select "Pickler Wealth" from the folder dropdown menu at the top right
  - Click the green "Compose" button at the top right of the page
  - Make sure all 3 social networks are selected (Facebook, Twitter and LinkedIn)
  - In the text field, write a brief message about how our new Article of Interest is now available
  - Insert https://www.picklerwealthadvisors.com/articles-of-interest after the above text
  - On the bottom of the pop-up window you are working in, click the trashcan icon to remove the automated image
  - Click "Send" from Sprout

Section 2: Social Media

- Social Media Accounts
  - Pickler Companies hosts multiple social networks to reflect the different firms in our suite:
    - Pickler Wealth Advisors
      - Facebook, LinkedIn, Twitter
    - The Pickler Law Firm
      - Facebook, LinkedIn, Twitter, Google Plus (boosts our SEO/Google results)
    - Pickler Accounting Advisors
      - Facebook, LinkedIn, Twitter
    - Pickler Companies
      - Facebook, LinkedIn, Twitter
    - David Pickler (personal)
      - Facebook, LinkedIn, Twitter

- Admin Access on Facebook
  - In order to gain access as an Admin on our Facebook networks, the current Admin needs to invite you
  - The current Admin needs to:
    - Login to the appropriate Facebook page
    - Click "Settings" at the top
    - Click "Page Roles" on the left-hand column
    - Enter the NEW Admin's name
    - Select the level of access they wish to grant the NEW admin (e.g. Admin, Editor, Moderator, etc.)
      - You will be asked for your password to confirm
    - To REMOVE an admin, use these same steps listed

- "Sprout" Social Media Hub
  - Sprout is the social media hub we use which is an online tool that is home to every social media network we have, including the President's personal social media networks. It is a convenient, one-stop place for all of our firms' postings.
  - Login to https://app.sproutsocial.com/login
  - At the top right, there is a folder icon
  - Clicking on that will present a dropdown menu of our different firms
  - Click on the appropriate folder depending on which channels you want to post to (e.g. Pickler Wealth, Pickler Law)
  - Click "Compose" at the top right
  - From here, you can use the arrow dropdown to select/deselect Twitter, Facebook and LinkedIn

- By clicking the camera icon in the post pop-up window, you can add an image from your computer
    - By clicking the trashcan icon, you can delete pre-populated links and images from your post

- Erado and Commonwealth Financial Network
    - Commonwealth Financial Network (CFN) archives our approved PWA social media channels through a service called Erado.
    - Erado certificates are mandatory for PWA social media sites (Facebook, Twitter, LinkedIn), and mandatory for staff who wish to mention PWA in their social media bios/posts
    - To receive an Erado certificate to monitor your social media, you must contact Commonwealth
        - Anyone in their IT department will be able to assist you
        - Reptech@commonwealth.com
        - X9995
    - Once they send you the Erado certificate link via email, go through the simple step-by-step process
    - You will be given confirmation once successfully completed

Section 3: Website

- Pickler Companies' Websites
    - Pickler Companies utilizes an online website builder called Wix. This software houses each firm's website as well as our foundation's site, American Public Education Foundation.
    - Wix is a drag-and-drop website builder, making the process easy to build and/or update pages

- Using the Website Editor
    - Open Wix.com
    - Log in to our account
    - Hover over the appropriate website thumbnail and click on the pencil icon to edit the site
    - Once the editor has loaded, click "Preview" at the top right to see a live preview of the site
    - To make edits to a website, click "Back to Editor" at the top right
    - Once in Editor Mode, you may now begin editing by clicking on the appropriate section of a page
    - To navigate pages, you can enter preview mode again or select the menu list at the top left corner of the screen
    - To add new media, shapes, contact forms or text, click the "+" icon on the left and choose from the list
    - When you have finished making edits, click "Preview" at the top right and make sure it formatted correctly
        - Also, click the "Mobile" button at the top and make sure the page looks correct for mobile devices
    - Once satisfied, click "Publish" at the top right
    - If you do not wish to publish yet, but would like to save your progress, click "Save" at the top right

- Accessing Website Dashboard
    - Go to the main Wix page (the page that features a thumbnail of all of our website)
    - Hover over the appropriate website, and click "Select Site"
    - From here, you can:

        - View messages from websites: click bell icon at top right
        - Manage domain
        - Mange the plan (we use Premium)

- Accessing Domains
    - We use 1and1.com to host all of our domain names
    - To access these:
        - Go to https://www.1and1.com/
        - Log in
        - On the left-hand column, select "Domains"
        - From here, you can select a domain name and manage DNS settings

Chapter 7: New Year's Letter and Client Calendar

- Each year in Q3, the Chief Branding Officer (CBO) works with the President to produce a New Year's Letter and customized Client Calendar featuring our mascot, the Pickler Bull
    - BOTH THE LETTER AND THE CALENDAR MUST BE COMPLETED AND SHIPPED TO CLIENTS NO LATER THAN DECEMBER 23RD
- NEW YEAR'S LETTER
    - The CBO is to schedule a meeting to discuss the New Year's Letter with the President
    - THIS MEETING SHOULD BE SCHEDULED NO LATER THAN NOVEMBER 15
    - After discussing the direction of the letter, the President drafts version 1 and gives to the CBO
    - The CBO then types it up in Word and formats it with our logo header and footer (mission statement)
        - These letters are saved in the Shared Drive: Communication > Mailings > New Year Letter
    - The CBO then works with the President to make edits and produce the final version
    - Once approved, the CBO uses Word to input client names and addresses onto each letter (see Mail Merge instructions)
    - Once the customized letters have been printed, the CBO gives the stack to the President to sign
    - The CBO is also to print address labels and return labels for the 9x12 envelopes which the letters and calendars will be shipped in. (use Avery to create labels)

- CLIENT CALENDAR
    - As with the letter, the CBO is to meet with the President to discuss next year's events and talk about the design for the new calendar (which bulls to use and which events to highlight)
    - The CBO creates the calendar in InDesign, using a downloaded template
    - Once the events are input into the calendar, the CBO creates "bull" graphics in Illustrator/Photoshop to accompany the calendar pages
        - The bulls are saved on the Shared Drive: Communication > Branding > Bull >
        - The calendars are saved on the Shared Drive: Communication > Branding > Client Calendar
    - The CBO then presents a mockup of the calendar to the President, making any necessary edits per the President's request
    - Once finalized, the CBO contacts our printing vendor, Clarke's Quick Print in Germantown

        - Mike Davis | mike@cqpgt.com
    - The CBO requests 1 full, bound sample and presents to the President
    - If approved, the CBO order enough for each client, staff member, as well as 20 additional

- <u>SHIPPING THE LETTER AND CALENDAR</u>
    - Once the letters and calendars are in-hand, the CBO works with the staff to stuff, label, seal, tape, and stamp each 9x12 envelope
    - BOTH THE LETTER AND THE CALENDAR MUST BE COMPLETED AND SHIPPED TO CLIENTS NO LATER THAN DECEMBER 23RD

Chapter 8: Measuring the Success of Outreach

- Any Team Member who interacts with a new prospect will ask the prospect from what source they heard of our company.

- The Team Member will report their findings to the Receptionist.

- The Receptionist will maintain a spreadsheet of Prospect contacts and the source of the Prospect.