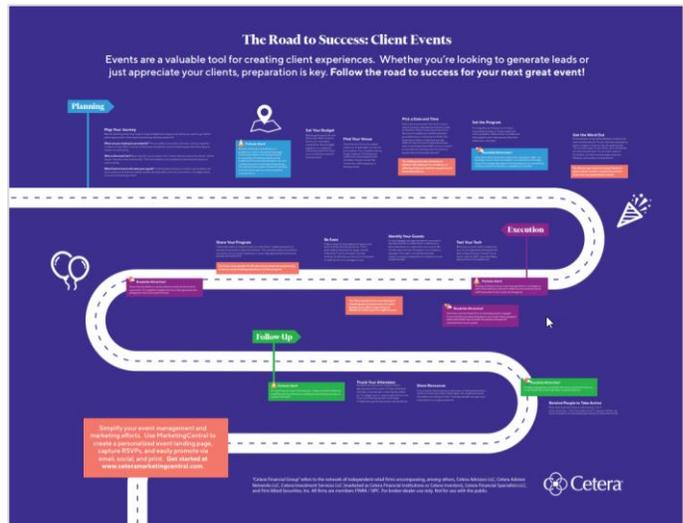# Events Guide

Using MarketingCentral to Plan and Promote Your Next Event

This guide highlights the key steps to event planning, and the many opportunities to leverage MarketingCentral to manage and promote your next client or prospect event. Use it to download educational presentations and event promotional materials, and send pre-approved and customizable communications.

Step 1: Plan Your Event

Brainstorm

Events are a valuable tool for building relationships. Whether you're looking to generate leads or just appreciate your clients, preparation is key. Follow the road to success for your next great event! Check out The Road to Success map for guidance. *(Zoom the image to read the text.)*

Looking to hold a webinar event instead?
This guide will help you get started with webinars.

Find Your Event Materials

If you're looking to hold an educational event—like a seminar, workshop, or lunch and learn—check out the presentations available on the left navigation panel of MarketingCentral under **Extras > Presentation > Library**.

Note: These materials will soon move to the Downloadables section of the Content Library. Stay tuned—more great event resources are coming!
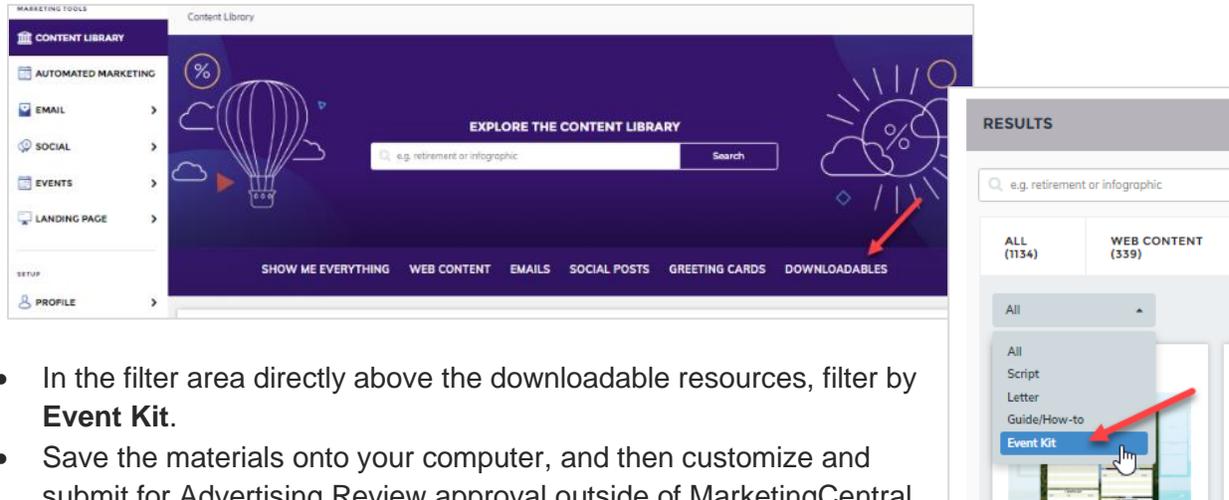

Downloadables

Event Kits are coming soon! New presentations will be added to the **Downloadables** area of the **Content Library** throughout the year. Access these new resources:

- Click on the **Content Library** on the left navigation panel.

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- Go to **Downloadables**.

- In the filter area directly above the downloadable resources, filter by **Event Kit**.
- Save the materials onto your computer, and then customize and submit for Advertising Review approval outside of MarketingCentral.

Compliance Requirements

Please note: Make sure to follow your broker-dealer's policies before hosting or participating in any public appearances, which can include events, seminars, forums, radio or television interviews, public appearance, or public-speaking activity.

1) Get approval from Advertising Review on communications (emails, social posts) and presentation (including a script) for webinars.
2) If posting a replay, get Advertising Review's approval of the replay after the webinar. You will need to burn the recording onto a disc and send to Advertising Review for archiving.
3) All scripts, information you plan to display, and follow-up materials must be approved by Advertising Review prior to use. This includes presentations, invitations, promotional flyers (print or on public sites such as your website or blog), social media posts, client materials, and any follow-up communications. Submit ALL materials together in one review request when possible.

Step 2: Create Your Invitee List

Before developing your communications, create your invitee list by grouping your contacts either in MarketingCentral or your customer relationship management (CRM) platform, if integrated with your MarketingCentral account.

Manually Adding and Updating Contacts

If you aren't syncing your MarketingCentral account to Redtail, Salesforce, Ebix SmartOffice, or WealthBox, this article explains how to assign your contacts to groups.

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Redtail CRM Integration

If you're already synced with Redtail and wish to update your tag groups and/or add an additional tag group, such as your invitee list for your upcoming event:

- First, add the tag group to Redtail. Then update your sync, if needed.
  - o **If you sync "All Contacts/Groups":** Your added/removed tag groups will be updated in the platform once the sync update has processed.
  - o **If you sync "Just Specific Groups":** You'll want to adjust which tag groups you're bringing over to include the new tag group.
    - Go to **Contacts** and in the dropdown next to **Update Contacts**, choose **Update current settings**.
    - In the **Groups** list, check the box next to the new tag group you wish to add. Then, click **Next** and then you need to confirm your changes.

If you aren't synced with your Redtail CRM but plan to integrate your MarketingCentral account with Redtail, this article explains how to integrate.

Other CRM Integrations

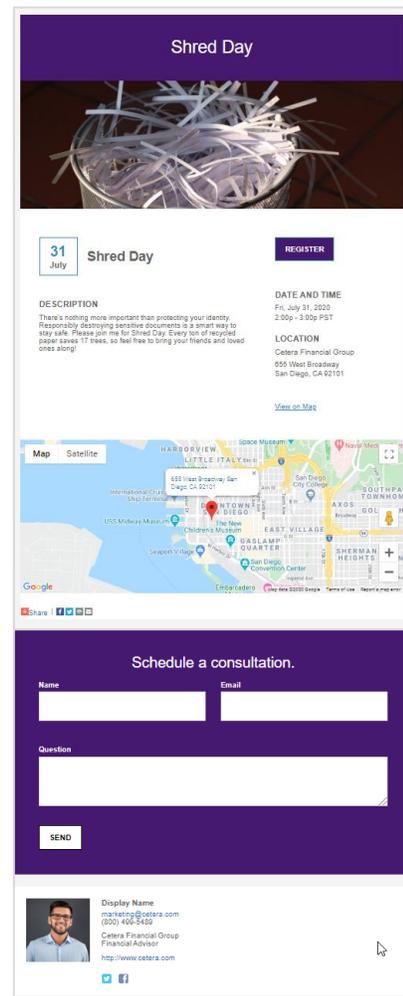If you need assistance updating your integration with a Salesforce, Ebix SmartOffice or WealthBox, please contact FMG Suite at cetera@fmgsuite.com or 858.312.5621.

## Step 3 (OPTIONAL): Create an Event Landing Page

Use the **Events** section in MarketingCentral to create a custom landing page and allow for registration to your upcoming event through this web page. *Example of an event landing page >>>*

An event landing page includes all the essential event details, including a way to register for the event and a lead capturing form at the bottom of the page. All RSVPs and form information are automatically sent to you and stored in your MarketingCentral inbox.

- If you have an FMG Suite website, this landing page could live on your website.
- You can still use this feature if you aren't an FMG Suite website customer and drive traffic to your landing page through email and social promotions noted in Step 4.
- We also recommend promoting your event directly on your website homepage within a banner or your holistic office calendar or events section.

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Once you're in MarketingCentral, click on **Events** in the left navigation panel [1] to start building your event landing page. Select **Create Event** [2]. Under **SELECT AN EVENT THEME**, choose the **Blank** option [3] if you don't want to use one of the event templates available.
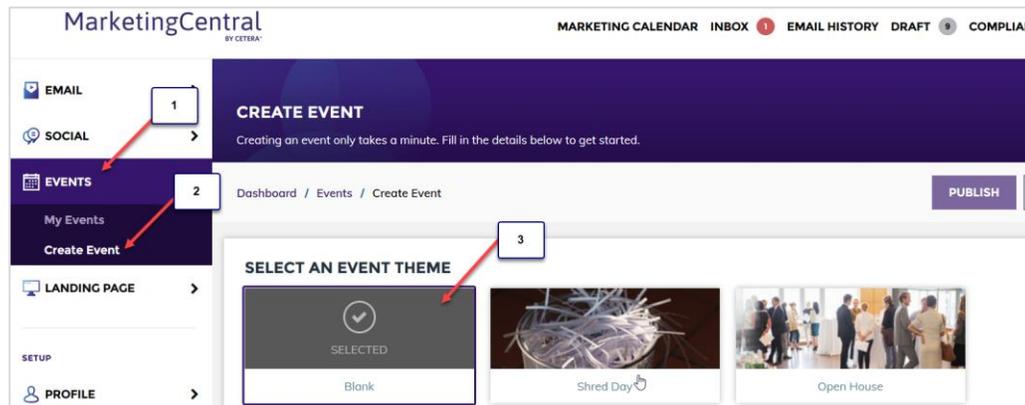
- **Event Info**: Complete the **Event Name**, **Description**, and **Summary** fields. If you chose the "**Blank**" event theme, upload an image for your **Landing Page Header image**. Upload your event banner image (suggested size is 1800 px by 600 px).
- **Event Location**: Enter the **Location Name**, **Address 1**, **Address 2**, **City**, **Region**, **Postal Code** and any **Additional Information.**
  - o **Tip:** Use the **Additional Information** section to encourage your invitee to bring a friend. This is also a good place to note parking details. For example, "Please feel free to pass this invitation along to any friends or family members you feel could benefit from this event!"
- **Registration Options**: Keep the **Allow guests to register for this event** box checked if you plan to use the landing page in MarketingCentral as the main registration page, or uncheck if you will not capture RSVPs here. Select the appropriate timeframe for when you want to stop taking RSVPs in the **Registration closes** dropdown. For the **Details for people who register** section, include any important information you want to share with registrants which you have not already covered.
- **SEO Toolkit**: Adjust your **Title Tag** and **Description Tag**, if desired. More information can be found here**.**

This article explains how to use the **Events** tool in MarketingCentral.
- **Tip:** If you don't want to create a landing page, consider creating your own event promotions, like an event flyer, instead. Or, keep it simple and include the event and RSVP details in your communications.

Submit for Approval

Click the **SAVE DRAFT** button if you want to come back to this page to finalize before submitting for approval. Otherwise, click the **PUBLISH** button to submit your landing page to Advertising Review. The review typically takes one to three business days. You can check the status of the review at any time by clicking **COMPLIANCE** at the top of the portal. Once the page is approved, you can proceed with building out the communications below to promote your event.

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Step 4: Customize and Send Your Event Communications

There are two ways you can use MarketingCentral to distribute communications to promote the event.

1) If you created an event landing page in the **Events** section noted in the previous step, the **Events** section also includes event promotions and sequences via email and social media posts that lead to your landing page.
2) Create custom emails and social posts, or use a printed card in the **Content Library**.
   - **Tip:** Consider creating an event landing page as noted above, grab the landing page link and include in your custom email and social communications.

Events Section

The event builder in MarketingCentral allows you to schedule out a sequence of emails to invite and remind your contacts. Click on **Events** in the left navigation panel and find your event in the **UPCOMING EVENTS** section. Under **ACTIONS**, click **Promote**.

Choose a Promotion Channel

You can choose one, some, or all of the promotional channels to spread the word about your upcoming event:

- **Email:** Select **USE** in the **Emails** box. You'll see a series of three emails built out for you with placement text and imagery. They are set to deliver a certain number of days apart, but you can adjust the frequency by typing over the number of days in the open field box.
  - o You may change the text and/or image in the email. Click **Edit Sequence** in the yellow box above the preview text and then click **Continue**.

- Adjust the text in the email if desired. The current emails will pre-populate with the event details from your event landing page.

- Upload a custom banner image instead of the current placeholder image, if desired. To edit an image in the email, click on the pencil icon to the upper right of the image. Then, select the button to **Click to add image…**, and then **SAVE** changes.

o Once all edits are made, choose the **ADD TO SEQUENCE** button. Then, click the **SEND SEQUENCE** button.

Choose who you will send the sequence to (all contacts, groups or individuals). In most cases, you will send to a group (your list of invitees). Click **NEXT** when done. Choose your send date if you wish to not send immediately once approved. Choose **SEND SEQUENCE**.
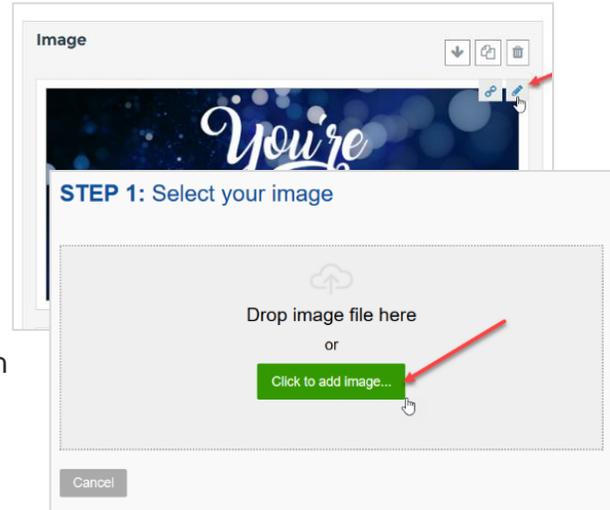
- **Social:** Select **USE** in the **Social Media** box. You'll see a series of six social posts built out for you with placement text and imagery. They are set to deliver a certain number of days apart, but you can adjust the frequency by typing over the number of days in the open field box.

  o You may change the text and/or image in the social post. Click **Edit Sequence** in the sentence above the preview text, then click **Continue**. To adjust the text in the social post, click the pencil icon in the upper right of the social post, adjust the text, and then click **Add Post**.
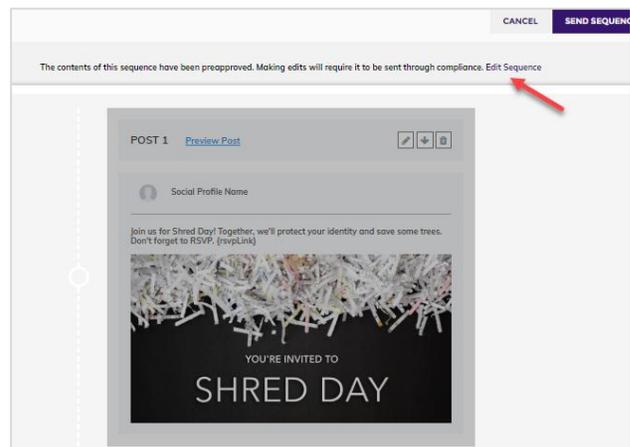
- o The current social posts will pre-populate with the event details from your event landing page. Upload a custom image instead of the current placeholder image, if desired. To edit an image in the post, click on the **X** icon to the right of the image displayed within the **Write your post** section. Select **Add Image** to include a different image. Then, select the **Add Post** button.
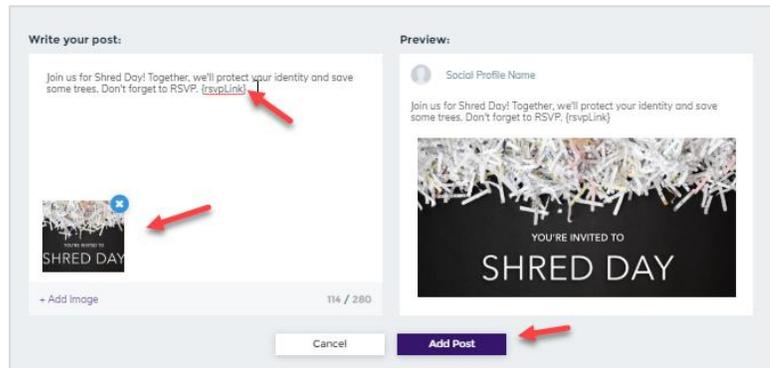
- **Greeting Cards:** Select **USE** in the **Greeting Cards** box. Select your audience, and click **Next**. Customize your message, if desired. The current card will pre-populate with the event details from your event landing page.
  - o You may change the text and/or image in the card by deleting/adding the text in the text box. Click **Next** and then choose the delivery date.
  - o Cards take six to eight days to deliver. Keep in mind that Advertising Review takes between one to three business days to review, on average. The cost to send greeting cards is $2.50 per card (includes print and postage) and will be charged to your credit card on file. If you don't have a credit card on file, you will be contacted by FMG Suite to provide once your order is submitted.

Create Your Own

Custom Email

You can also create a custom email from scratch if you prefer not to use the Event promotions sequences. On the left navigation panel, go to **Emails** > **Create email**. For more information on how to build a custom email, review this article.

- Link to your event landing page if created in the **Event** section. Otherwise, provide information on how the invitee can RSVP for the event within the email text.
- You can click the plus sign to add a section to the email, for example a button that says, "Register here," which you can then link to your event landing page.
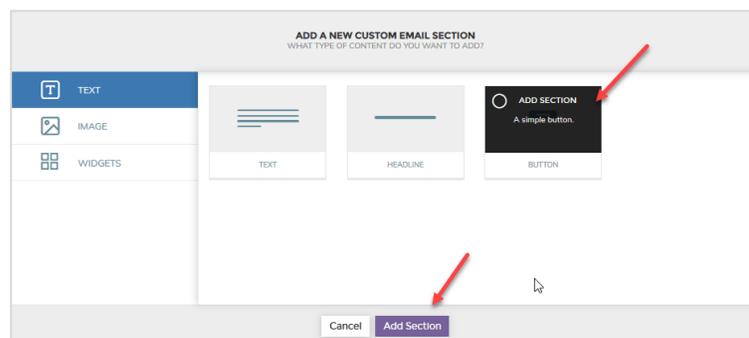
Custom Social Post

You can also create a custom social post from scratch if you prefer not to use the Event promotional sequences. On the left navigation panel, go to **Social** > **Post on social**. For more information on how to build a custom social post, review this article.

- Link to your event landing page if created in the **Event** section. Otherwise, provide information on how the invitee can RSVP for the event within the social text, or link to another online location where one can register.

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Custom Cards

In the Content Library, click on **Greeting Cards**. In the area to the left of the **Card Results**, select **Event Invitation** in the dropdown. Click **Send** next to the card you'd like to deliver. Select who you wish to send to. Add your custom text. Click **Next**. **Deliver ASAP** (once approved) or choose your **Delivery Date** and **Confirm**. *(See the section above for card pricing and timing.)*

Have Questions?

Contact FMG Suite at cetera@fmgsuite.com or 858.312.5621.