2025

LinkedIn Strategy

1.0 EXECUTIVE SUMMARY

There is an opportunity to increase our engagement from the financial advisor audience through our LinkedIn presence with promotional and thought leadership content.

2.0 STRATEGY OBJECTIVES

Double our followers, increase engagement, and build credibility and trust with financial advisors by sharing valuable insights— positioning ePlan Services as knowledgeable, collaborative partners.

3.0 Content Themes

1. **Educational (Blogs & Webinars)**
    - Content that helps financial advisors better understand retirement plans, compliance updates, and how partnering with ePlan Services can boost their book of business.
    - Promote webinars designed specifically to support advisors with tools and industry knowledge.

2. **Thought Leadership from ePlan professionals**
    - Insights on marketing trends impacting retirement planning and advisor-client relationships.
    - Advice on how financial advisors can enhance their offerings through retirement plan partnerships.
    - Sourcing: Send concise monthly emails or slack messages to ePlan professionals with targeted questions for a quick and easy turnaround. We could even take the opportunity to ask relevant questions during marketing meetings. Questions could include: “What’s one key trend financial advisors should watch in retirement planning?” or “How can advisors better support their clients with retirement solutions?”

3. **Referral Program (if applicable)**
    - Opportunities to save their clients money by referring them to ePlan Services

4. **Testimonials**
    - Success stories from financial advisors who have partnered successfully with ePlan or satisfied plan participants.

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4.0 MARKETING STRATEGIES AND TACTICS

Marketing strategy

We will take a content marketing-based approach to this campaign.

Cadence

- 2-3 LinkedIn posts per week blending pillars
- 1 thought leadership post per week featuring ePlan leader insights or short interviews.
- Monthly posts spotlighting referral programs and success stories.
- **Best Practices:** Post regularly with the best time of day being 1:00 PM PST

5.0 Content Post Calendar

Day	Content Type	Topic	Leader Input?	CTA/Notes	Promo/Engagement
Monday	Blog	CalSavers	No	Learn more here	Promo (ongoing priority)
Wednesday	Thought Leadership	Tip for advisors	Yes (a quote, via slack or email)	Ask for feedback or encourage sharing	Engagement
Friday	Webinar Promotion	Upcoming webinar overview	No	Register today	Promo (ongoing priority)
*Tuesday (if applicable)	Engagement Post	Poll Question: What's the biggest challenge with selling retirement plans?	No	Encourage comments and participation	Engagement
*Thursday (if applicable)	Engagement Post	Advisor or participant testimonials	Yes, provide testimonials	Encourage connection or referrals	Engagement

6.0 Monitoring and Evaluation

Metrics

- Monthly tracking of LinkedIn engagement (reactions, comments, shares, clicks)
- Simple updates on which types of content resonate more with followers.

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