

**OBJECTIVE.**

Provide social media and website audiences with consistent brand awareness, combining personality and pitch, in cohesive social media output strategy. Accompanying online platform chosen based on ease of administrative use, reliable post scheduling and distribution, and queuing of all social media and website feeds into effective audience distribution. Organization of carefully assessed content to align social media efforts with marketing and sales targets. Provide current and future WealthCo clients with quality information and articles conducive to their lifestyle and interests.

**SUMMARY.**

The importance of social media management requires careful coordination of incoming information, attentive moderation to mitigate any risks to the company or its reputation, and intelligently curated content that fits both the pitch and personality that WealthCo aims to project to current and potential clients. Social media and content management is curated and posted via a robust, feature-rich software solution that simplifies and streamlines how WealthCo manages its presence and brand in popular social media networks.

**SOFTWARE.**

The EClincer platform was chosen as this management tool due to the numerous benefits it offers, including but not limited to:

- Content curation
- Advanced publishing - post and article (content) scheduling
- Wix website integration and easy feeding from site to scheduler (now via RSS integration).
- Distribution of single-sourced content to multiple channels (e.g. WealthCo's Facebook page, LinkedIn profile, Google+ account, and corporate website.
- Auto-post options, including ability to queue original WealthCo content and news directly from other prominent news sources.
- Ease of Administrator use - all controls are cleanly laid out and clear in operation for user.
- Content recycling
- Engagement, website, and social media analytics
- Hashtag and keyword monitoring
- Team collaboration and agencies

**DELEGATION & ACCOUNTABILITY.**

The decision to delegate this project to an administrator is up to the discretion of the Marketing & Communications / Creative Director.

Accountability for all content posted on WealthCo social media and website(s) is the responsibility of the Marketing & Communications / Creative Director, through their delegation, for the duration of the project and the duration of the Marketing & Communications / Creative Director's employment with WealthCo.

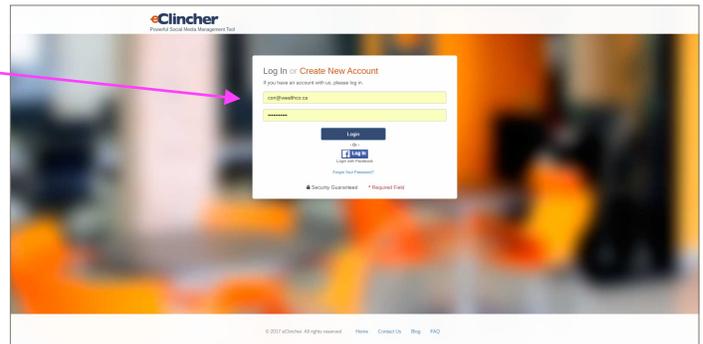


**ECLINCHER SOFTWARE / SCHEDULER.**

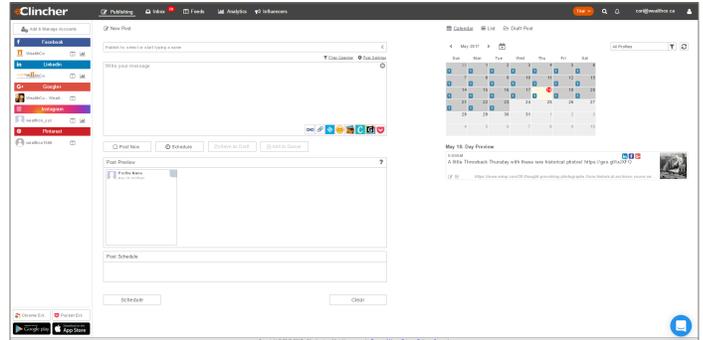
In June 2016 WealthCo began testing, and then using a new media management software platform called eClincher (<https://eclincher.com/>). The aim of management platform is to manage multiple social media accounts from a centralized hub and perform multiple automated tasks in a few clicks. The tool allows you to publish and schedule posts, pins, and/or tweets to multiple social media networks. Marketing campaigns developed by WealthCo are easily pushed out via the same channels, providing a seamless information flow of local, national, and international content to audiences from reputable business, lifestyle, and news sources.

**HOW TO.**

1. Login to [www.eclincher.com](http://www.eclincher.com) with username and password.



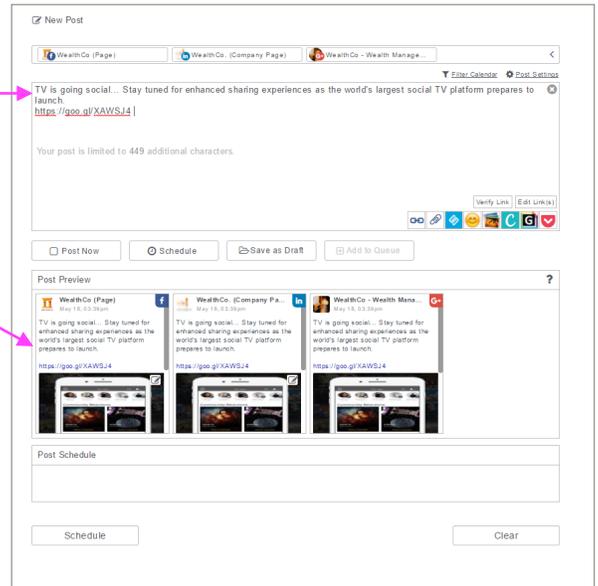
2. When you open eClincher, you will be taken to the Administrative Dashboard. Here you can see all social media channels and the associated eClincher controls.



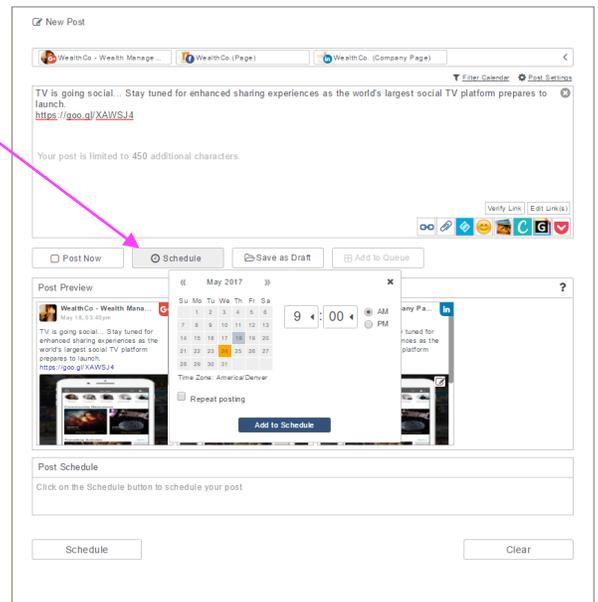
3. To create a new post, first choose the social media channel(s) from the dropdown ("Publish to") on which you'd like the post to appear. Choose LinkedIn, Google+ and Facebook for WealthCo.



4. Once the channel(s) are chosen, begin writing your post or lead-in to introduce the content. Include the URL of the article (incl. WealthCo Insights) you wish to link to - eClincher automatically clips longer URLs to be more social media friendly. Check often throughout the process to ensure the text, link, and associated imagery are appearing correctly in the "Post Preview" below.

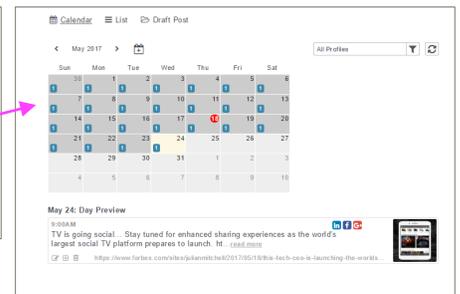


5. Click on the "Schedule" button immediately below the main content creation window to set a date and time for your post to appear on the chosen social media channels.

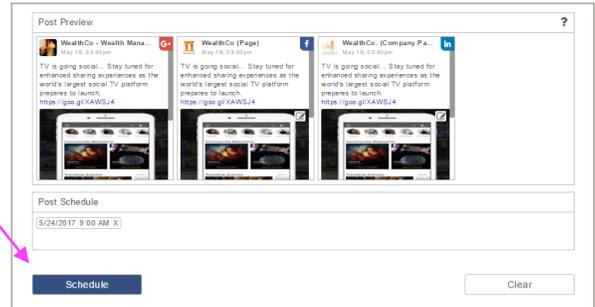


6. Confirm that the post is scheduled at the correct date and time by checking:

- "Post Schedule" window immediately below "Post Preview", and
- the calendar on the far right column of the dashboard.



7. When you have confirmed that all scheduling details are correct and the post appears as desired, click the "Schedule" button.



**YOUR POST IS NOW SCHEDULED.**

If you have any questions, concerns or insights regarding the usage of eClincher or current campaigns and strategies being managed through this and other platforms and tools, please forward them to [cori@wealthco.ca](mailto:cori@wealthco.ca).



**TROUBLESHOOTING:** "Tokens" or permissions granted to EClincher to post to specific social media platforms on WealthCo's behalf may be revoked somewhat randomly. LinkedIn is famous for this. Ensure that you have a current password list for all social media platforms and can update the tokens/permissions in EClincher as required. Daily monitoring of social media feeds (all channels) is highly recommended.

**CONTENT CURATION.**

What we say is just as important as how we say it. All messaging on social media or to other external sources must focus on positive aspects of our services and our clients' lifestyles, in addition to the society and industries we live and work within. It is better, for example, to include a sourced article on how to be more productive at work rather than post negative news on disgruntled employees in the current Canadian economy.

Content curation typically focuses on the following topics:

- Retirement and retirement planning
- Luxury lifestyle and purchasing
- Travel and tourism
- Health, recent innovations, and fitness
- Insurance and investment planning (note: do not include competitive companies/sources, or articles offering specific investment or insurance advice)
- Wealth planning
- Canadian real estate (e.g. luxury homes & lifestyle focused)
- Holiday-specific content (e.g. Halloween costume ideas, navigating corporate holiday parties, etc.)

**FREQUENCY.**

Typically, WealthCo aims for two social media posts to be released each day, including on the weekends and holidays. One post comes from reputable online news or entertainment sources and follows one of the topics outlined above. The other post is comprised of a graphic created by WealthCo Marketing & Communications and is designed as a direct pull to increase visitors to the main WealthCo website. These in-house created graphics and posts can also be used to highlight a specific campaign or service / product offering.

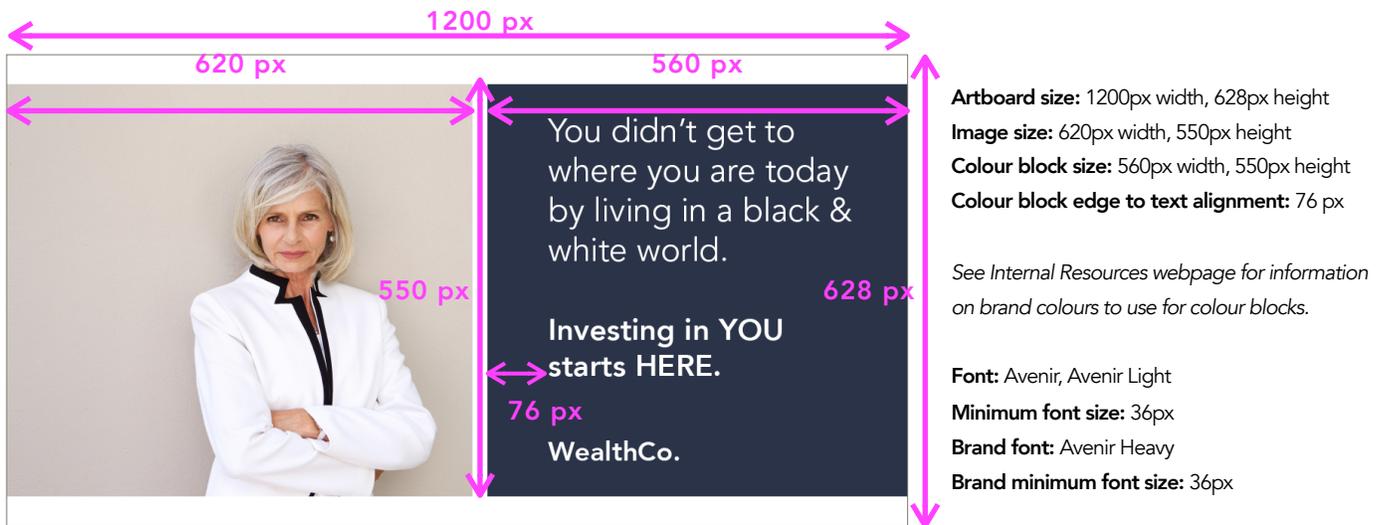
**IN-HOUSE GRAPHICS.**

Extensive research and graphic manipulation has been put into the creation of the WealthCo social media post template - to ensure that the imagery looks good and fits regardless of which platform it is pushed to via EClincer. That said, graphic parameters on social media platforms change all the time. Adjustments may need to be made to ensure proper sizing on all platforms as time progresses.

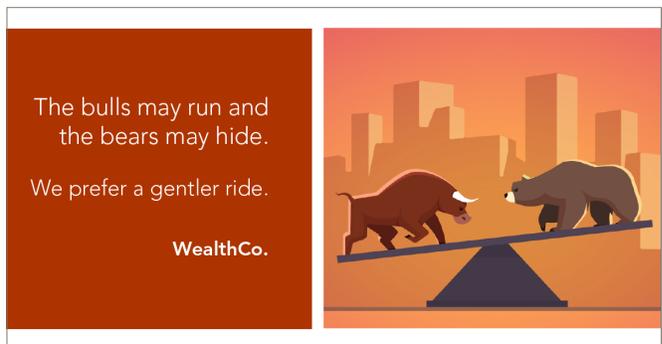
All in-house graphics, when posted via EClincer, should link back to [www.wealthco.ca](http://www.wealthco.ca) or a specific campaign landing page attached to the main WealthCo website. Additionally, the hashtag #WealthCo. should be added to these posts.

**SOCIAL MEDIA POST TEMPLATE.**

Adobe Illustrator files are available internally for easy post creation. Alternately, artboard, text, colour block, and imagery are sized as follows:



**Example:** Campaign graphic. Imagery used for posts typically includes direct shots of people (intended to represent WealthCo clientele, however vector imagery/illustrations may be used if appropriate to the campaign itself and pre-approved for use by WealthCo M&C.



**TROUBLESHOOTING:** Social media posts should be saved in both JPG and PNG formats. When saving to PNG, ensure that the background is white rather than transparent. JPG-100 seems to be the file format preferred by EClincer/all current channels - using this format will prevent many issues. PNGs are retained for use on the website or may be included in email blasts to clients.

## CAMPAIGNS.

Campaigns may be created to highlight specific news (e.g. remaining stress-free despite market fluctuations), WealthCo releases (e.g. Fund Facts), upcoming holidays, or to increase focus on a WealthCo service or offering (e.g. positions available in the company, insurance options available to clients, etc.). Campaigns can lead to a much larger increase in traffic to the website and social media channels - creating the kind of “buzz” that inspires clients to call us for more information.

Campaigns typically consist of the following:

- **Landing Page** - custom-created and branded Wix sub-page within the main website ([www.wealthco.ca](http://www.wealthco.ca)) that provides information, buttons linking to ‘Contact’ someone internally (or form to fill in and submit for more information). May also contain button or link to a PDF Printable format of article. The page name should be distinguishable as a specific campaign (e.g. “.../stress-less-with-insurance”)
- **Printable** - internally designed PDF containing the same or related information to the Landing Page. Usually designed in Pages and exported to PDF. Please see most recent branding information, available sample, or Printable template to ensure visual consistency on all external messaging such as this.
- **Social Media Posts** - Generally 8-10 posts are created (see above for Social Media Post Template) to draw social media users towards the Campaign Landing Page. These posts should include any graphics used on the Landing Page and/or Printable. When queued into EClincer, the related post text should include an introductory sentence that sets this campaign apart from usual WealthCo posts. It should also include the hashtag (#WealthCo.) and the Landing Page URL. Scheduling frequency and number of posts may be determined by length of the campaign run. Campaign posts may replace any standard content that has been scheduled within EClincer, as needed and directed.
- **Email Blast** - 2-3 paragraphs to introduce the campaign to WealthCo clients and leads by email. Should contain teaser text to entice users to visit the Landing Page, forward the message to friends and colleagues, and contact us for more information.



**TROUBLESHOOTING:** When creating the Landing Page for Campaigns, ensure that current brand standards, logos, and colours are being used. The look of these pages should be somewhat visually consistent with prior Campaigns. Particular attention should also be paid to the SEO Settings and related page naming within the Wix Page Settings. These settings can be accessed and changed by clicking on “Manage Pages” within the Wix menu that shows all pages within the WealthCo site.

If you have any questions, concerns or insights regarding current or past Campaigns and strategies, please forward them to [cori@wealthco.ca](mailto:cori@wealthco.ca).