National Practice Accelerator

Field Marketing Menu of Services

NPA Marketing provides strategic marketing guidance and development based on each NPA practice's unique needs, enabling teams to expand their brand and their relationships.

Our approach

NPA Marketing helps drive engagement and results through:

- Driving brand awareness for NPA teams in their local market
- Supporting advisor/team growth
- Increasing marketing engagement (programs, campaigns, tools and resources)

What we support

With dedicated resources for each practice, we manage our relationships with care and deliver tailored practice-level support focused on your needs – while also providing key platform level support to benefit all NPA practices.

- Marketing consulting & strategy
- Custom targeted marketing plans
- Custom marketing materials (print & digital)
- Monthly marketing check-in calls
- Ongoing guidance for driving key marketing metrics (social, websites, email)
- Additional training opportunities
- Dedicated Creative & Compliance support

- Regular marketing updates in the NPA weekly newsletter
- Targeted emails for key, timely updates (Plan to Thrive, market resources)
- Marketing growth strategies
- CSM marketing campaigns
- NPA-specific resources

Core focus areas

We take a holistic and comprehensive view centered on 5 key focus areas designed to build your foundation, deepening engagement and driving growth with those you serve.

Team Positioning 	Establish a **clear and concise value proposition** that attracts prospects and reinforces with clients why they choose you.	• Mission/vision language that defines your brand • Custom team brochure that tells your story • Integrated messaging across website, client communications, social & marketing materials • Custom team videos/podcast* (scripts) that connect in a compelling way • NPA-branded materials in Storefront / The Store and custom team logo kits that elevate your team branding alongside Thrivent
Client/Prospect Contact 	Maintain **consistent contact** with clients and prospects to ensure they're feeling informed, well supported and confident as they pursue their financial goals.	• Custom client newsletters that deepen relationships • Focused marketing strategies and CSM campaigns to drive targeted growth for your practice and deepen client relationships • Targeted client emails or letters that deliver timely & relevant value-add content • Expanded market commentary resources to keep clients informed and staying the course • Flexibility with participation in Plan to Thrive (and other) marketing campaigns, with added support to drive results
Website 	Make a **strong online connection** with your prospects and clients by building and maintaining your own website	• Content strategy to help you optimize your site • Digital capabilities for team brochures & newsletters to drive engagement • Coaching to drive SEO and strengthen your digital presence
Social Media 	**Leverage the power of social media,** meeting clients where they're at and creating personal connections that drive results.	• Social media consulting and guidance to expand and grow your network • Strategy & content support for Facebook and Instagram advertising/campaigns to help you reach new prospects • Resources to assist in content development & planning
Prospecting 	**Expand your reach** by leveraging your network to grow your business and reach more prospects.	• Advertisements that drive brand awareness (print/digital/billboards/radio) • Direct mail to target growth in key markets • Prospect nurture campaigns to drive conversion • Lead generation prospecting tools to expand your reach

*Unable to host your own podcast/radio program. May be featured on existing podcasts with proper Media Relations and Compliance approvals.

Extended support beyond marketing

Our goal is to keep you focused on high-impact marketing initiatives that build your brand and your relationships to help drive business growth. To ensure consistency across business partners and the field, there are certain areas that fall outside the scope of our team. The following content types are not supported through custom marketing:

- Sales literature or product-specific materials
- Advice process or Dedicated Planning Services materials
- Market commentary materials
- Business cards and stationery (existing NPA branded options available on Storefront)
- Joint Field Work requests
- Custom practice/team logos

Use the grid below for guidance and support for the content types listed above – and beyond:

Request type	Recommended Resource
Custom **advice** related materials (Including areas of specialty planning, e.g. divorce, Medicare, business & college planning)	• Leverage existing Dedicated Planning Services resources and supporting marketing materials on Storefront • Use supporting materials from Broadridge Advisor Solutions • Contact Advice team at ThriveWithAdvice@thrivent.com to share needs for future consideration.

Awards	• For *existing* approved awards, refer to Field Awards and Recognitions for guidance and requirements
	• For approval on *new recognitions*, complete this form along with providing the survey and data/verification details (see the Field Awards and Recognitions page).
	    ○ Once approved to proceed, the application submission & approval process is the responsibility of the advisor.
	    ○ Once the award is granted, additional information may be needed to create disclosures and confirm approved methods of marketing.
	    ○ Once Compliance guidance is received, custom marketing can begin (all materials must include appropriate disclosures and follow usage guidelines specific to each award)

Events (Planning, materials & promotion for all advisor/team-led events, local TMN & Plan to Thrive National Speakers)	• Email the NPA Engagement team for support at npgetteam@thrivent.com • Contact Box Financial Education to propose new workshop topics of interest for Thrivent to consider creating.
Fraternal programs & Community partnerships (Church relationships, Thrivent Community, Thrivent Action Team, Thrivent Choice)	• Email the NPA Engagement team for support at npgetteam@thrivent.com
Team **Google Business Profile** listings	• Currently in transition, support is temporarily paused. • Digital Client Experience (DCX) team is addressing technology limitations to provide more seamless support for team listings. • Begin by making necessary updates in systems of record for all individuals (Workday) and teams (Salesforce)

Photos
(Websites and Storefront marketing materials)

- Individual photos should be emailed to Box Photos and Signatures (include hi-res jpg and TSID)
- Team photos should be labeled with full name and TSID(s), then uploaded to Salesforce under the 'Request Marketing' button. Options provided to indicate if photos are for Website (designate one photo) or Storefront (no limit)
- Photos can take 5-7 business days to upload. For any issues submit a Service Now ticket for support
- *Note*: Website photos come from other systems and update every night. If you change a photo directly on the website, it won't stay — it will be replaced by the version from the main systems (noted above)

Press releases

- Leverage existing News Release Templates
- For unpaid media opportunities, contact Media Relations
- For paid media opportunities, contact NPA Marketing

Printing, mailing or distributing materials

- Use the NPA Custom Printing Request via Storefront
- Leverage staff on your own team to support or consider hiring Field Practice Solutions for marketing and practice support

---

Product-specific materials

- Leverage existing product support resources and supporting marketing materials on Storefront
- Use supporting materials from Broadridge Advisor Solutions
- Contact product team(s) to share needs for future consideration. Contacts provided on each product page on WeThrive Field > Solutions

---

Recruitment marketing

- Work with your assigned Sr Sourcer to get jobs posted to Workday & for help with promotion on sites like Indeed
- Create a custom social post to promote jobs using Recruiting Social Media Posts for FAs. Leverage the Recruitment Kit for added support.
- Leverage NPA-exclusive & customizable resources:
  - Custom recruiting letter (24396C)
  - Customizable recruiting Booklet (33211N)
  - Team-focused recruiting Social posts (filter 'recruiting')
- Use the new Experienced Advisor pitchbook and Experienced Advisor Recruiting flyer (ability to update with your contact information)
- Use existing resources in Storefront (under Financial Advisor Recruiting)

Salesforce lists

- Teams can use pre-built list Salesforce report templates built for Email Playground, which also identify which clients are able to receive emails.
- Email lists must be formatted as:

A	B	C	D	E
Thrivent ID	Assigned Rep Name	Lodge Name: Lodge Number	Customer: Primary Email	First Name

- Mailed letter lists must be formatted as: (may need to remove duplications to avoid multiple letters going to the same household)

A	B	C	D	E	F	G	H	I	J
Thrivent ID	TSID	Assigned Rep Name	Client First Name	Client Last Name	Client Name	Address	City	State	Zip Code

- For more support, schedule a Salesforce Report Consult for a 1x1 session for assistance in creating reports and getting additional 'how to' training. (Box Marketing is not able to support generating client lists)
- For CSM marketing campaigns, your NPA Marketing Strategist will coordinate a planning call with your NPA Client Experience Specialist to customize your campaign and build your team's campaign & opportunities trackers in Salesforce.

Client **service communications**	• Use existing templates on Storefront, such as:
	  ○ FA Succession & Retirement letter (includes ADV mailing language)
	  ○ Reassignment to Virtual Advice letter (Virtual Advice page)
	  ○ Implementation Checklist cover letter
	  ○ DPS Fee Adjustment letter
	  ○ Advisor Guided client letter
	• Support Managed Account clients with:
	  ○ Using resources from Brokerage & Managed Accounts
	  ○ Referring to existing trade confirmations that are sent to clients (Email Playground is intended for marketing and is not approved for service-related communications)
	  ○ Leveraging Managed Account Annual Review resources in meetings to review market updates and provide clients with rationale for recommendations

Slybroadcast	• Slybroadcast is not approved to use as a marketing tool and is intended to support compliant and supervised client communications. • The tool is not an approved method to invite clients to events due to solicitation and recordkeeping issues, however it can be used to follow up on invitations sent & for post-event follow up. • NPA Marketing maintains a library of 30+ pre-approved scripts to support a variety of needs, which is updated annually (or periodically as needed; one-off custom scripts are not supported) • New users should begin by completing the training module and then work with Carie Stabile for added support, including new account set up under the Thrivent Slybroadcast Umbrella Account to remain compliant.
Technology support (websites & search)	• Submit a Service Now ticket for any site or search issues to engage the Digital Client Experience (DCX) team • Provide feedback or enhancement requests with this form
Third party lead generation tools	• Leverage the existing tested and Compliance approved 3rd party lead gen tools and associated resources available. Marketing can help with *existing* program support. • New tools are not being added at this time & require approval from Compliance, Technology & Marketing.
Third-party market commentary	• Fiducient and Nepsis are Thrivent's two approved third-party sources for market commentary approved for use with clients. Both align to Thrivent's POV and are reviewed by Compliance. • Custom market commentary materials are not allowed.
Wealth management materials	• Leverage existing Wealth Management resources
Yext Relate	• Yext Relate is not approved to use as a marketing tool and is intended to support compliant and supervised correspondence with clients • Use resources on the Field Texting Program page, including the Quick Start Guide, User Guide, Learn2Thrive training and more. • For issues contact Hearsay Relate (Texting) Support - Employee Center

Achieving success – together

NPA Marketing is dedicated to your success. We can do great things when we work together as true partners. Here's what we ask of you:

- Participate in marketing planning and check-in calls
- Execute aligned marketing plan tactics
- Prepare and plan for custom marketing support needs
- Complete reviews of custom marketing materials in a timely manner
- Include both your dedicated Marketing Strategist & Sr. Marketing Specialist on your communications
- Let us know how we can better support you!

Contact us

Reach out to your dedicated NPA Marketing team or send an email to teamnpamarketing@thrivent.com
We're excited to work with you!