



Colin Hautman - LaborFirst Work Samples 1

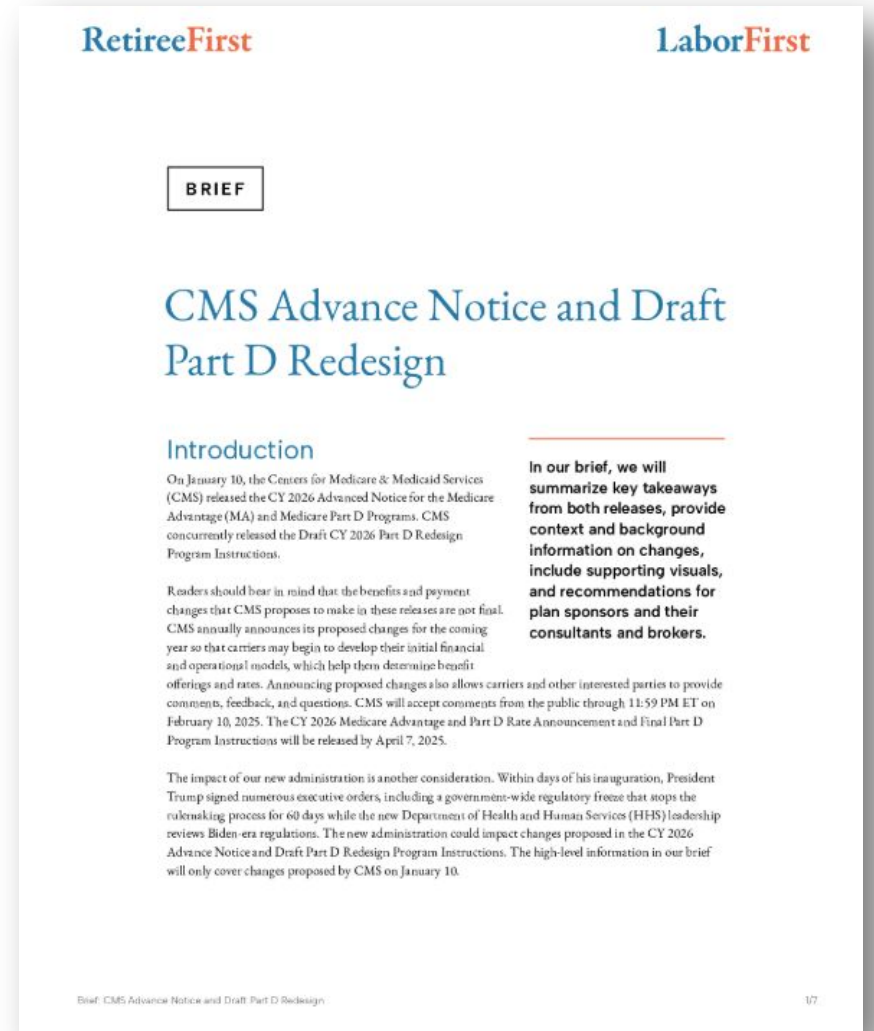


2025 CMS Advance Notice Brief Campaign

Advance Notice Campaign Overview

Campaign Tactics and Assets:

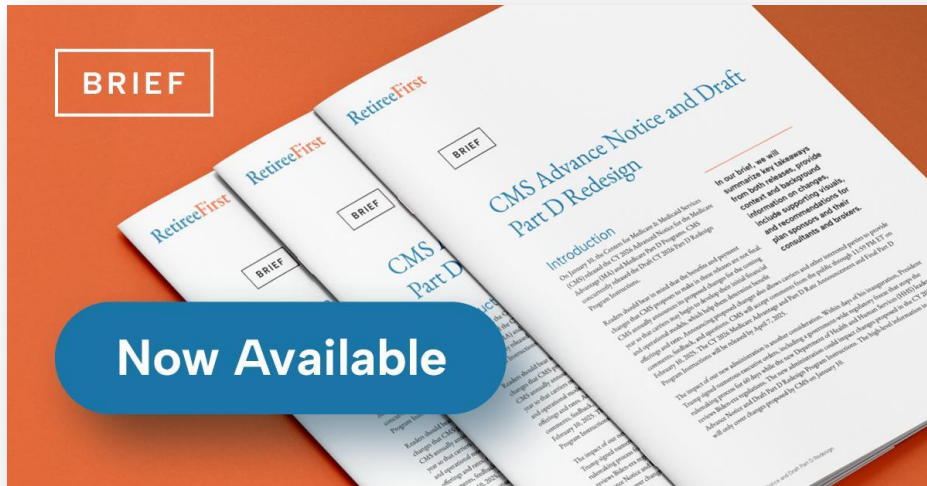
- Posted the Brief to a landing page on our website behind a gated lead gen form
- 2 organic LinkedIn posts each to RF, LF, and Executive Pages
- 9 paid LinkedIn promotional ads (Single Image and Conversation Ads)
- 3 lead gen emails with resends to non-openers targeting our 3 segments:
 - Public Sector
 - Labor
 - Brokers
- Added a new blog to our website directing visitors to the gated form to download the Brief
- Partnered with ULAN for distribution across their network
- Provided email copy to RVPs for their own individual outreach to their targets



Advance Notice Campaign Results

- **51 Total Leads**
 - **Sales Account MQLs: 26**
 - **Public Sector: 15**
 - **Labor: 3**
 - **Commercial: 8**
 - **Broker and Consultant Leads: 17**
 - **Carrier Leads: 8**
- You can find the list of leads [here](#)

- **563 RetireeFirst.com Total Page Views**
- **45 Form Submissions (Leads)**
- **22 LinkedIn Form Submissions (Leads)**
- **Total of 67 leads**
 - **16 Rejected Leads**
 - **Grand Total of 51 Leads**
- **14,104 Influenced Contacts** (The number of new or existing contacts that engaged with one or more assets in this campaign)
- **Total of 3,479 Unique Email Opens**
- **Total of 178 Unique Email Clicks**
- **212 Net New Visitor Sessions on our Website**
- **39 Likes and 6 Reposts on LinkedIn Company Pages** (Not including RetireeFirst executive LinkedIn Pages)



New Webinar Save the Date

Final Notice Webinar with Sheela Andrews on May 21 at 1pm EST



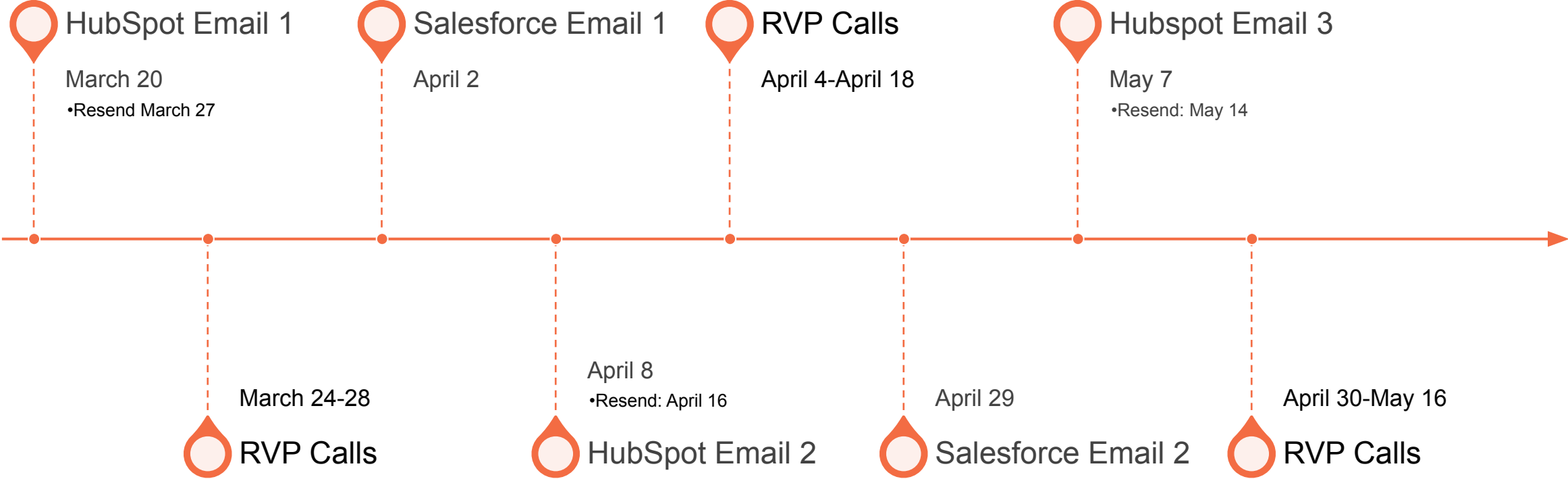
2025 ABM Campaigns

Campaign Overview

8 Week Campaign:
March 20 – May 16

- 3 HubSpot Emails
- 1 Landing Page for Meeting Bookings
- Related Collateral (Blogs, Case Studies, Testimonials)
- 2 Salesforce Engage Email Templates
- RVP Calls to Target Contacts (10 per Week)
- RVP Emails to Target Contacts (10 per Week)
- LinkedIn Connection Requests and Direct Messages (5 per Week)

Timeline



Current Status & Next Steps

- **All ABM Campaigns are launching tomorrow, Thursday, March 20th**
- Emails are in plain text format – appearing as if they are coming directly from outlook. They are being sent from the RVP's email address so be on the lookout for bounce back and OOO replies.
- All campaign materials for all RVPs are located in [BOX](#) (Campaign PPT, Tracking Spreadsheet, Final Target Contact List, Email Copy)
- Each RVP will have individual Salesforce Engage email templates in a folder under your name
- **Please log all calls on the contact record** under the activities section. Meetings can be logged under the account. Emails will log automatically.
- Make sure to send connection requests to the target contacts on LinkedIn and when they accept, send a message using the copy provided in your personalized copy docs found in [BOX](#)
- **OPTIONAL:** In each RVP folder in [BOX](#), there is a link to a tracking spreadsheet that includes all of the target contacts from the target accounts. In this tracking spreadsheet, please feel free mark down when you email, call, LinkedIn message, and book any meetings along with the dates of the actions if it helps you. (Some RVPs have liked this in the past)
- Email metrics (opens, clicks, etc.) will be marked in the tracking spreadsheet as well to help prioritize your outreach.
- The CDE's will have check-ins with their associated RVPs throughout the campaign, but if you have any questions – reach out to your CDE or Marketing
- Weekly metrics will be sent out to each RVP covering all activities and email performance stats. (See slide 12 for an example of this email)

ABM Weekly Reporting

Marketing will send weekly reports tracking activity. Please let us know any results you are getting!

Week Over Week Activity Metrics:

Example: Fitz Upstate NY K-12 ABM Campaign

ACTIVITY DATE - WEEKLY / ACTIVITY TYPE							TOTAL
2/24/2025		3/3/2025		3/10/2025		4/7/2025	
CALL	EMAIL SENT TO CONTACT	CALL	EMAIL SENT TO CONTACT	CALL	EMAIL SENT TO CONTACT	MEETING	
5	125	31	29	12	1	1	204

Week Over Week Lifecycle Stages of Campaign Accounts:

ACCOUNT LIFECYCLE				TOTAL
SALES SUSPECT	UNQUALIFIED	SALES QUALIFIED	PURSUING	
3	38	29	1	71

Meeting booked: Thomas Potter with Cattaraugus-Allegany Schools Medical Plan on 4/10/25

Marketing Email results:

- Email 1:
 - 65 opens
 - 0 clicks
- Email 2:
 - 53 opens

Campaign: <https://laborfirst.box.com/s/7wui3uh6chko5wwgk040vwlk2fgxstba>

HubSpot reports: <https://app.hubspot.com/reports-dashboard/23289453/view/15455451>



Appendix

Campaign Expectations from Growth Team

Sales

- 10 Calls/Week to contact targets that work for the 4 target ABM accounts
- RVP logs all calls under the contact record in Salesforce
- 10 Emails/Week to contact targets that work for the 4 target ABM accounts
- RVP sends out 5 connection requests and direct messages/week to target contacts on LinkedIn

Marketing

- Plan ABM campaign, build target contact lists, write email and LinkedIn message copy, launch and monitor campaign performance
- Pull weekly reports on email performance and create a metrics tracking spreadsheet that will be shared with the RVP so he/she can see the target contact engagement with our marketing emails
- Track RVP calls, email, and meeting booking activities through HubSpot reporting

Growth Ops

- Weekly meetings with RVPs on how the ABM campaign is going and what improvements can be made
- Help marketing with developing contact target lists for each RVP
- Monitor RVP calls, email, and meeting booking activities through Salesforce reporting
- Create tracking spreadsheet that shows all target contacts from all 4 accounts

1 kdeitz@psecu.com

2 [Template Icon]

3 Insert a template...

Search "ABM", find your name and click on it to insert ↓

How to Use SF Engage Email Templates

Insert Email Template

Select a template for: Contacts Prospects

4

Search templates...

Name	Description	Template Folders
Template #1 - RDS Campaign		RDS Campaign
POST-Webinar Email: "What to Know About the CMS Final Notice"	Post-Webinar Follow-Up for What to Know About the CMS Fina...	Courtney Campbell
POST-Webinar Email: "What to Know About the CMS Final Notice"	Post-Webinar Follow-Up for What to Know About the CMS Fina...	Webinar Email Templates
May 2024 Webinar - CMS Final Rule - Diane	RetireeFirst -Upcoming Webinar: What to Know About the CMS...	Diane Everett
May 2024 Webinar - CMS Final Rule	LaborFirst -Upcoming Webinar: What to Know About the CMS ...	Courtney Campbell
Template #2 - Cold Outreach w/Flyer IBEW	Includes Flyer Attachment	Courtney Campbell
Template #2 - Cold Outreach w/Flyer	Includes Flyer Attachment	Courtney Campbell
Template #1 - Cold Outreach	No Attachments	Courtney Campbell
April Template #3 - Cold Outreach w/Personalized RVP Overview Flyer	Advocacy message, with link to Personalized RVP Overview Flyer	Cold Outreach Templates - April 2024
April Template #2 - Cold Outreach Public Sector	Public sector savings/ alleviating plan admin message	Cold Outreach Templates - April 2024
Template #2 - Cold Outreach w/Flyer	Includes Flyer Attachment	Diane Everett
Template #1 - Cold Outreach	No Attachments	Diane Everett
FITZY PROSPECT Webinar Invite: "Navigating Medicare in		

Cancel

RVP Calls and Salesforce Engage Emails RetireeFirst

- Make 10 calls and 10 emails per week to the target contacts in this campaign
 - Make sure to log all calls to target contacts in Salesforce **on the contact record** under the activities section
(see screenshot below)
- After you reach out to every target contact, make sure to schedule follow-up tasks to circle back around with follow-up calls and emails to the target contacts in your campaign

The screenshot displays the Salesforce CRM interface for a contact record. The contact is identified as Kristy Deitz, a Graphic Designer at PSECU, with contact information including email (kdeitz@psecu.com) and phone numbers. The record is owned by Diane Everett. The interface is divided into several sections: 'Details' (left), 'Qualification Details' (top right), and a 'Call' activity log (bottom right). The 'Call' activity log shows a single entry with the subject 'Call' and a type of 'Sales Call', scheduled for 6/5/2024. A 'Save' button is highlighted in the bottom right corner of the interface.

Field	Value
Title	Graphic Designer
Inactive	<input type="checkbox"/>
Phone (2)	
Email	kdeitz@psecu.com
Contact Owner	Diane Everett
Account Name	PSECU
Contact ID	0038Z00003cbHKuQAM
Direct Inward Dial Phone	
NVM Phone	
Phone	
NVM Mobile	
Mobile	
Fax	
Turn Off Marketing Activity	<input type="checkbox"/>
Do Not Call	<input type="checkbox"/>
Inactive	<input type="checkbox"/>
Primary Contact	<input type="checkbox"/>
Primary Communication Contact	<input type="checkbox"/>
Contact Source - LSN	<input type="checkbox"/>
JD Xmas List	<input type="checkbox"/>
ABM Target	<input type="checkbox"/>
Description	This person is a graphic designer. But see if she can give you the name of someone in HR and Benefits for PSECU.

RVP LinkedIn Connect Requests & Messages

- Connect with each of the target contacts in your target accounts for this ABM Campaign
- After connecting & they accept, message them with the LinkedIn Copy that Marketing will provide (5/week)

