
Saving for Retirement

New Course Go-to-Market & Sales Enablement

Grade Level: High School
K12 Financial Wellness Suite

Introduction

What should we consider to ensure a successful launch?

- Target Audiences
 - Buyer Personas
 - Competition
-

Target Audiences

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Primary Audience: School & District Admin

- In particular, admins that have the following standards will be a good fit.
 - **STANDARDS:** *Jump\$tart's National Standards in K-12 Personal Finance Education, Council of Economic Education's National Standards for Financial Literacy, National Council for the Social Studies C3 Framework, Council of Economic Education's Voluntary National Content Standards in Economics*
 - **BUYER PERSONA:** David Goodman

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Secondary Audience: High School Teachers

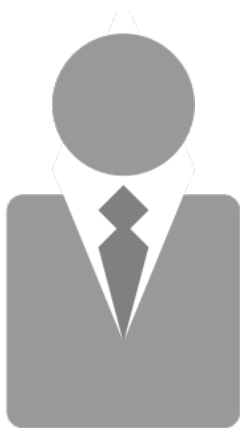
- In particular, teachers of the following subjects will be a good fit.
 - **SUBJECTS:** Economics, Social Science, CTE
 - **BUYER PERSONA:** Ms. Thorn

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Tertiary Audience: High School Students

- In particular, students that are interested in financial literacy will be a good fit
 - **BUYER PERSONA:** Jamal Smith
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Buyer Persona: David Goodman



56 years old

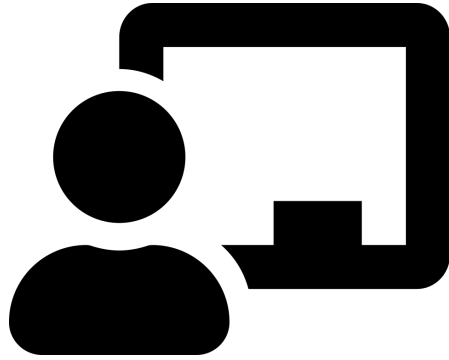
Administrative Assistant To
The Director of Curriculum

Springfield School District, MA

Key Traits

- **Established**
 - He's been working at the Springfield school district for over 20 years. It's best to reach him by email during the work day.
 - **Directly connected to a decision maker**
 - He's respected by the Director of Curriculum and the District Superintendent. His recommendations are trusted.
 - **Flexible**
 - His district is diverse, so he's always looking for something that will meet all his students' various education needs.
 - **Interested in financial literacy**
 - He grew up in a rural area of the state with few resources. He credits his financial success to proper money management, not luck.
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Buyer Persona: Ms. Thorn



34 years old

Economics & Math Teacher

Springfield High School,
Springfield, MA

Key Traits

- **Hard worker**
 - She works well over 40 hours in one week. She keeps a summer job to help with bills. The best time to reach her is during a rare break in the school day.
 - **Multi-tasker**
 - She teaches different courses to many grade levels. She wouldn't respond to messaging that was subject-specific.
 - **Young & eager**
 - She's looking for software to make teaching easier. She'll connect with educator communities on social media.
 - **Passionate**
 - She got into education because she cares about teaching students practical life skills
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Buyer Persona: Jamal Smith



16 years old

11th grade student of Ms. Thorn

Springfield High School,
Springfield, MA

Key Traits

- **Sports player**
 - He's committed to his football team, but he has some extra time in the off-season. The best way to reach him is through his mobile device.
 - **College-bound**
 - He's hoping to get a scholarship for a 4-year school. He's undecided about his major, but likes math and science.
 - **Middle-Class**
 - His family can provide for his needs, but he understands that a lack of funds could be a barrier to his quality of life.
 - **Close to Ms. Thorn**
 - Economy is his favorite subject! He feels comfortable approaching his teacher one on one.
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Competition

- The competition seems to focus on investment education and general financial literacy. It's hard to find retirement advice for teens, specifically.
- Web searches for queries related to “*retirement education for teens*” yielded some general articles, but few products or courses.
- Of the products that did appear for related terms, the majority were not focused on saving for retirement specifically (*examples to the left*).

Conclusion: The lack of direct-match competitors means that there is likely little demand for this product niche. Our strategy will involve educating the market and cross-selling, to make up for the lack of demand.

Teach Me Wall Street

- <https://www.teachmewallstreet.com/investing-101-for-high-school>

Ramsey Solutions

- <https://www.ramseysolutions.com/store/youth/teens>

Warren Buffet's Secret Millionaire's Club

- <https://www.youtube.com/user/SecretMillionaires>

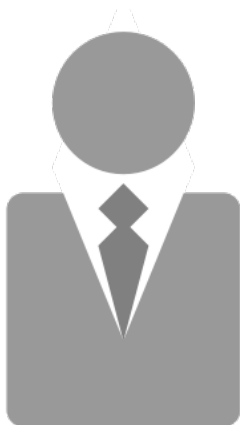
Wealthy Habits

- <https://wealthyhabs.org/>
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Product Positioning

What's the core message around the product?

- Product-Market Fit for Admin
 - Product-Market Fit for Teachers
 - Product-Market Fit for Students
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Product Fit for David Goodman

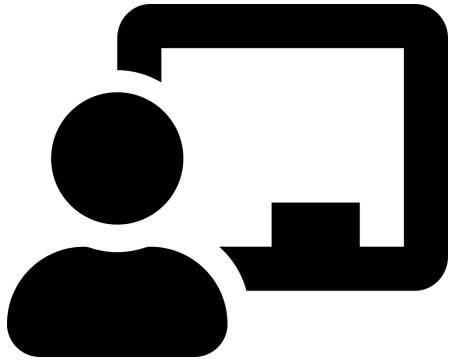
Unique Selling Propositions

- **Accessible:** 100% free, easy-to-use digital platform
- **Flexible:** Fits into a traditional economy, social science, or CTE class
- **Socially Responsible:** Ending generational poverty starts by closing the wealth gap. Teach young adults to save for retirement and they'll pass that wealth to their children.

Calls-to-Action

- Schedule a call with our implementation specialists
 - Download the curriculum guide
 - Introduce us to your team
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Product Fit for Ms. Thorn



Unique Selling Propositions

- **Easy to implement:** The digital learning experience is ready for class with little to no lesson planning. The content is 100% free.
- **Remote-friendly:** Lessons can be done on computers, smart phones, or tablets.
- **Socially Responsible:** Empower your students to take control of their financial wellbeing by making simple steps now.

Calls-to-Action

- Download the course outline
 - Download the curriculum guide
 - Preview the lessons
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Product Fit for Jamal Smith



Unique Selling Propositions

- **Fun:** The gamified lessons are interactive and rewarding.
- **High-tech:** Use the cutting-edge digital platform from your computer, smart phone, or tablet.
- **Smart:** Putting a small amount of money into retirement now will make you lots of money in the long run.

Calls-to-Action

- Tell your parents about us
 - Tell your friends about us
 - Tell your teachers about us
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Goal & Strategy

Where are we going and how do we get there?

- OKRs
- Cross-sell / Upsell Strategy
- New Lead Strategy



Objectives & Key Results

One Year Goal:

- Place new course in **1,000 high schools** across the US
- Get about **50 students** using the programs each campus

6 Month Goal:

- Place new course in **300 high schools** across the US
- Get about **20 students** at each campus

3 Month Goal:

- Connect with **6,000 leads** who have already heard of the product
 - Reach **5,000 new leads** with web content, social posts, or paid advertising
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Strategy: Upsell & Cross-sell

Web & Content:

- Use general messaging for **all three buyer personas**
- Feature course thumbnail for 3 - 6 months on Financial Wellness page
- Create unique landing page for this course and link to it from other internal pages
- Direct paid traffic to this landing page from Google Ads or paid social

Email:

- Use messaging for **Buyer Persona: David Goodman**
- Schedule 3-email campaign to go out to all current users with course information
- Set up lead follow up with sales team for the contacts that demonstrated interest

Social & Community:

- Use messaging for **Buyer Persona: Ms. Thorn**
 - Schedule a 5-post series announcing the new course launch on each channel
 - Organize a webinar about the importance of saving for retirement for teens
 - Promote this webinar with Teacher Ambassador program
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Strategy: Build Awareness & Leads

Web & Content:

- Use messaging for **Buyer Persona: Jamal Smith**
- Create a series of blog articles & videos explaining the importance of saving for retirement.
- Add a CTA to share the post with your teacher
- Create a lead capture form to collect contact information of teachers

Email:

- Use messaging for **Buyer Persona: David Goodman**
- Write a white paper on “Why We Should Teach Teens to Save for Retirement”
- Allow access to this white paper only by email from a implementation specialist

Social & Community:

- Use messaging for **Buyer Persona: Ms. Thorn**
 - Share the blog, video, and white paper on social media channels, tailor each post to each channel
 - Sponsor these posts on social media
 - Promote this webinar about the importance of saving for retirement on email, web, and social
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Questions?

Email Ashley Kochans
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