To: David Kon
Subject: Go to Market Strategy for WealthFluent

Dear Dr. Kon,

Thank you for this opportunity to present our robust yet practical Go-to-Market Strategy for WealthFluent. Enclosed you will find our executive summary detailing our plans and, in many cases, step-by-step instructions on how to engage your most advantageous demographic. These insights will help you penetrate the FinTech space through a strategic differentiation approach. While younger consumers can be challenging to capture, a data-driven approach makes it entirely achievable.

For your convenience, we've included a brief breakdown of key action items below.

We are excited to share this plan with you and look forward to your feedback. Thank you for your time and consideration.

Best regards,
The Warriors of Wall Street
Cy Wareham
Teak Wareham
Espen Williams

Click here for: Go-to-Market Strategy

Action items:

1. Simplify mobile sign-ups and optimize mobile performance.
2. Gamify the Magpie with customization and turn it into an interactive chat bot.
3. Develop a referral program with incentives.
4. Hire/assign a social media manager or intern.
5. Conduct A/B testing for emails (1-3 per month).
6. Collaborate with relevant podcasts (1 every 2-3 months).
7. Contact influencers via Instagram or email to become affiliates with commission-based incentives.
8. Offer free access to students via university partnerships and promote through university websites, flyers and events.
9. Target HR and benefits managers at companies with retirement plans to offer trials or pilot programs.
10. Track conversion rates and employer adoption.