

Distribution Plan for Fidelity Investments

Campaign Goal: Increase brand awareness and engagement by educating young professionals (ages 25-40) on smart investing strategies through a multi-channel social media campaign.

Step 1: Identify Target Audience & Platforms

Fidelity’s primary audience consists of **young professionals** who are new to investing but motivated to grow their wealth. Key platforms for distribution include:

- **LinkedIn** (thought leadership, professional investors)
- **Instagram & TikTok** (short-form educational content, influencer partnerships)
- **YouTube** (longer explainer videos, webinars)
- **Twitter/X** (real-time market insights, engagement with finance trends)
- **Email Newsletter** (personalized investment tips for existing clients)

Step 2: Develop a Campaign Grid

Platform	Content Type	Frequency	Key Message	Engagement Strategy
LinkedIn	Articles, Infographics	2x/week	Retirement planning, market trends	Polls, expert Q&As
Instagram	Reels, Carousels	3x/week	"Investing 101" tips, success stories	Influencer takeovers, AMA Stories
TikTok	60-second explainers	2x/week	Myth-busting, beginner-friendly guides	Hashtag challenges (#SmartMoneyMove)
YouTube	Tutorials, Webinars	1x/week	Deep dives on ETFs, diversification	Live Q&A sessions with advisors

Platform	Content Type	Frequency	Key Message	Engagement Strategy
Twitter/X	Threads, Market Updates	Daily	Real-time financial news, quick tips	Retweet finance experts, engage trends

Step 3: Execute & Optimize

- **Paid Promotion:** Boost high-performing organic posts (e.g., TikTok explainers) to targeted demographics.
- **Influencer Collaborations:** Partner with finance YouTubers (e.g., Graham Stephan) and micro-influencers on Instagram/TikTok.
- **Performance Tracking:** Use analytics tools (e.g., Sprout Social) to monitor engagement rates, click-throughs, and conversions. Adjust content based on data insights.

Conclusion:

By leveraging a mix of **educational content, influencer partnerships, and data-driven optimization**, Fidelity can effectively engage young investors across platforms. Continuous A/B testing will refine messaging for maximum impact.

Works Cited

Tuten, Tracy L., and Michael R. Solomon. *Social Media Marketing*. 4th edition, Sage, 2023.

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