



# Midterm Progress Report

Prepared By:  
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## Audience Overview

There are two main target audiences for the campaign: 1) a tech/finance-savvy professional with work experience of two to three years; 2) a fresh graduate that has just started working and is eager to learn more about their financial options:

- **Young Tech-Savvy Investors:** This group consists of high-earning professionals in their early-to-mid 20s, often working in fields like technology and finance. They have intermediate to advanced financial knowledge and are already engaging with investment opportunities such as ETFs, cryptocurrency, and stock options. These individuals are analytical and data-driven, preferring to use research-backed insights and AI-powered tools to make informed financial decisions. Yet, they often feel overwhelmed by the vast number of investment options available and seek efficient, user-friendly platforms that can integrate multiple financial assets. They value transparency, simplicity, and tools that provide clear, actionable insights to help them maximize returns and explore tax-efficient strategies.
- **Early Career Professionals Seeking Financial Guidance:** This audience includes young adults who have recently graduated and entered the workforce, often in fields that did not provide formal financial education. While they are eager to become financially responsible, they often feel uncertain about where to start when it comes to budgeting, saving, and investing. Their primary financial goals include paying off student loans, building credit, and saving for major life investments such as homeownership. They are looking for accessible and easy-to-understand financial resources that can help them gain confidence in managing their money. Additionally, they value stability and social connection, gravitating toward companies and platforms that align with their personal values and offer community-driven financial support.

(for detailed customer personas, please view the Appendix)

## Distribution Summary

Based on research, the most effective distribution schedule for busy professionals is once to twice a week, centering around Mondays to Wednesdays. The most effective time to send newsletters is between the standard working hours of 9 a.m. and 5 p.m. and is said to be especially promising around 3 p.m.

Due to the tight timeline of this campaign and the limited budget, I would recommend MailChimp as a newsletter distribution platform. Mailchimp is the most popular email marketing tool in the market, and its easy-to-use interface will allow for a seamless onboarding experience for GSWM. However, one of the main cons of Mailchimp is that there is a limitation in the monthly send limit and subscriber based on the pricing plan that GSWM chooses. Another con is that Mailchimp will charge for unsubscribed and even inactive contacts in the database, so an organized scheme of managing subscribers will be required. GSWM can test out the free plan to see what impact their newsletter has, and then can climb up the pricing plan based on needs and demands.

# Content Summary

## Tone of Deliverables:

- **Professional and Trustworthy:** Since GSWM specializes in wealth management and investment, their audience will expect credibility, expertise, and reliability. A polished yet approachable tone will build trust for their target audience.
- **Educational:** GSWM should use a tone that simplifies complex financial topics, making investing feel accessible rather than intimidating. They should also explain the sustainable impact their services offer, as the target audience resonates with companies that are making a social impact.
- **Supportive:** GSWM should avoid overly technical jargon and instead use clear, relatable language that meets potential clients at their level of financial knowledge.
- **Personable:** The tone should be welcoming and encouraging to appeal to new and younger investors. Adding a humorous tone will also help the content be personable .

## Content Details

- **Introduction:** This will be the first newsletter in the series, so it will need to be welcoming and explanatory of what GSWM is and the services they offer.
- **Short and Sweet:** The target audience is categorized as Gen Z. They prefer images over long text-based content, and for textual content, the text will need to be simple.
- **Mobile-Friendly:** Constantly online, readers will most likely absorb information from their mobile devices. Thus, the newsletter will have to be readable on mobile platforms.
- **Empowering Insights:** The newsletter will introduce concepts that will help Gen Z consumers build, preserve, and manage their wealth. The content will break down complex topics by using simple terms and a casual tone
  - Refer to competitors for effective approach to young investors (Appendix-3)

## Technical Details

The ideal file size of the email will be 75 KB to avoid being flagged as spam or being deleted.

The recommended width of the newsletter is between 500 to 600 pixels for optimal mobile fit.

- **Pre-Header:** 50-100 words to provide brief glimpse into content. This will appear in an inbox between the subject line and the sender's name.
- **Header:** Around 100-150 pixels in height to feature the company logo, brand colors, and basic contact information.
- **Content Blocks:** Around 200-300 pixels in height for each content block, and the section should have a total height of 800-1,200 pixels for optimal readability and engagement. Each content block will have around one to two images that will be less than 100KB per image and have a maximum width of 600 pixels. For information newsletters, this section should have a total word count range between 1,500-2,500 words.
- **Footer:** Around 100 pixels in height to include social media icons, contact details, a website address, and legal or copyright disclaimers.
- **Font/Text Size:** To align with the professional tone of the newsletter, the serif font of Georgia will be used for the text and main content. The content blocks will have a font size of 12pt., while the headings will range from 18-29pt. depending on the content block.

# Progress

I have enough technical information to create a draft newsletter for GSWM. My next steps are to research the actual financial content that I can write about for the newsletter. I will also need to find relevant images to insert in the content blocks. I will draft the newsletter on MailChimp with the outlined technical specs. I will also need to make sure that the newsletter will approach the two main target audiences that I have laid out for GSWM.

# Challenges

Since this email template will be the first of the many newsletters to come, I am currently conflicted on including a CTA button that will guide readers to GWSM's services. I am currently trying to understand GSWM's purpose of the newsletters better because some brands will use their newsletters as promotional campaigns of their products (e.g., sale promotions, new product launches), while others may utilize newsletters to be a marketing campaign to promote their brand. Unless I figure out which direction GSWM wants to go forward with, I cannot decide on the CTA for the newsletter. I am also still trying to understand how to incorporate competitor insights into the newsletter.

# Questions

1. How long will this campaign go on for?
2. How many emails should I draft for this campaign?
3. Will the CTA of the newsletter be to obtain more subscribers to the newsletter, creating an account for GSWM, or accessing new products that GSWM offers?
4. What is the KPI of this campaign?
5. How can I weave in competitor insights into the reports?

# Appendix

## Appendix-1: Customer Persona 1

**JORDAN MITCHELL**

**PROFILE**

Gender : Male  
Age : 24  
Education : Undergraduate  
Occupation : Software Engineer  
Address : New York, NY



**FINANCIAL KNOWLEDGE**  
Intermediate - Advanced

**BIOGRAPHY**

Jordan lives in Manhattan with two roommates from college. He thrives in the fast-paced world of technology and information. Jordan has a successful career, with his income around \$130,000, which is combined with stock options and performance bonuses.

**BEHAVIORS**

Jordan's high flexible income has exposed him to wealth-building opportunities, including ETFs and cryptocurrency. Analytical by nature, he enjoys using data-driven insights and AI-powered tools, backed by research, when making financial decisions.

**GOALS**

Diversifying investment portfolio  
Maximizing returns  
Exploring tax efficient strategies

**FRUSTRATIONS**

Overwhelmed by number of investment options  
Non-user-friendly interface for websites/tools  
Limited availability of platform that integrates multiple assets

**VALUES**

Jordan values efficiency, simplicity, data, transparency, and community. He is willing to dedicate time for things he sees value in.

**FAVORITE WEBSITES**

- Bloomberg
- Instagram
- Github
- Reddit
- Twitter

**INTERESTS**



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## Appendix-2: Customer Persona 2

### EMMA JOHNSON

#### PROFILE

Gender : Female  
 Age : 21  
 Education : Undergraduate  
 Occupation : Registered Nurse (R.N.)  
 Address : Los Angeles, CA



#### FINANCIAL KNOWLEDGE

Beginner

#### BIOGRAPHY

Emma recently moved to Los Angeles for her job as a Registered Nurse at a major downtown hospital. She is excited for her new journey but is feeling overwhelmed by the financial responsibilities that come with it. With her steady income, Emma is eager to learn more about responsible finance options.

#### BEHAVIORS

Emma's college curriculum was based on healthcare, so she was unable to become exposed to formal education on topics such as budgeting, investing, or savings. She is currently focused on paying off her student loans, building her credit, and saving for major future investments (ex: owning a home).

#### GOALS

- Building savings
- Building credit
- Learning to budget
- Paying off debt

#### FRUSTRATIONS

- Not confident in making financial decisions on own
- Doesn't know where to start in investing
- Too many financial investment platforms to choose from

#### VALUES

Emma values stability and sociality. She values her social circle, as she just recently moved to a new city. She also values companies that are making a difference in the community.

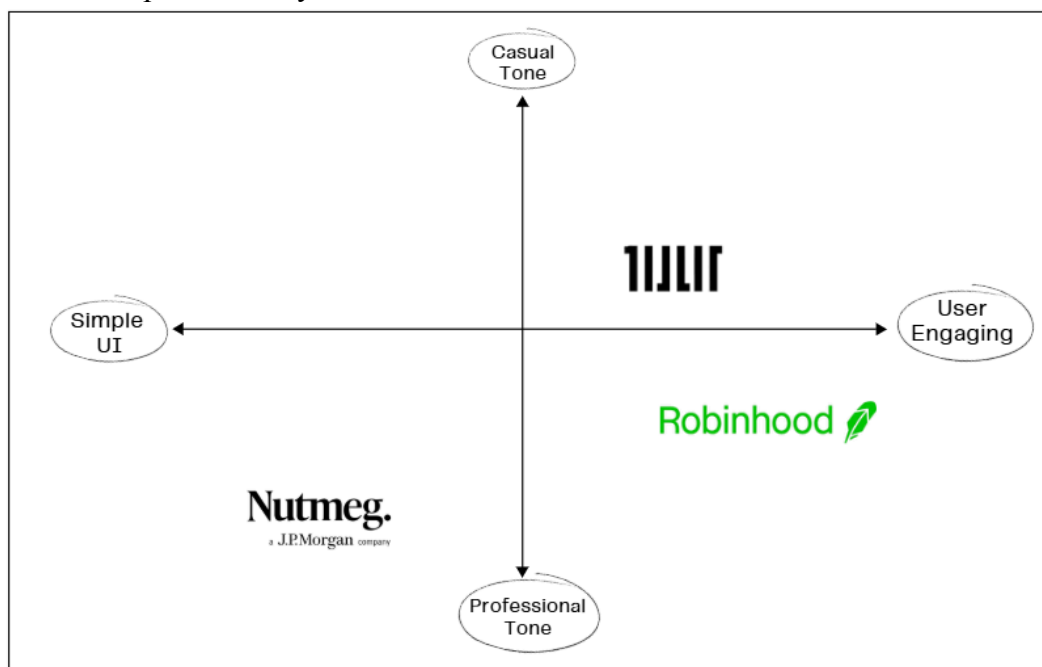
#### FAVORITE WEBSITES

- TikTok
- Instagram
- Amazon
- Spotify
- DoorDash

#### INTERESTS



## Appendix-3: Competitor Analysis



## Appendix-4: Artificial Intelligence (AI) Usage

In this report, I had the support of AI to strengthen my sentences and organize my thoughts. I then edited the tone of voice and word choice to align with the tone I hoped to convey in this report.

# INVOICE

#1001

**BILLED TO:** Garvey & Statler Wealth Management

**PAY TO:** Hanna Yoshida  
123 Anywhere St., Any City  
123-456-7890

Bank Fake Bank Name  
Account Name Hanna Yoshida  
Routing Number 000-000  
Account Number 0000 0000

PayPal Account @hannayosh

| DESCRIPTION          | AMOUNT          |
|----------------------|-----------------|
| Audience Overview    | \$30.00         |
| Distribution Summary | \$30.00         |
| Content Summary      | \$50.00         |
| <b>TOTAL</b>         | <b>\$110.00</b> |

Payment is required within 30 business days of invoice date.  
Please send remittance to hanna.yoshida0916@gmail.com.

Thank you for your business.