



A collage of business and technology icons. It includes a server rack with two units showing '3' and '24', a large blue gear, a target with a cursor, a magnifying glass over a document, a checklist with three items, and a large blue arrow pointing upwards. The background is blue with a white dotted pattern.

banzai.org

Contents

School Product Use & Implementation

Getting Started With Schools	4
Launch Plan	5
Presentations	6
Teacher Communication	6
Reporting	7
Teacher Development	7
Branding	8
Teacher & Student Feedback	8

Community Product Use & Implementation

Getting Started with Direct	10-11
Launch Plan	12
Working with Direct	13
Banzai Manager	14
Wellness Center	15
Integrating External Resources	16
Collections of Content	16-17
Featured Content	18
Calls to Action	18-19
Offers	20
Rewards	21
Embedded Content	22
The Copy & Paste Library	23
Marketing Content	24
Customizing your Wellness Center	25-26

School Product Use & Implementation

[Back to Table of Contents](#)

Getting Started With Banzai for Schools

These are your first steps to empowering teachers, engaging with students, and strengthening your community impact through hands-on financial education.

With your sponsorship, schools receive free access to Banzai's award-winning financial literacy resources. And the students aren't the only ones to profit from new educational resources. This program also supports teachers by offering professional development, teacher training, classroom materials, with your brand at the center of it all.

This guide walks you through how to make the most of your school partnership, from setup to success.

School Product Implementation

When you sponsor a school through Banzai, your institution becomes their direct partner in financial education. Here's how to get started and ensure the program thrives in your sponsored classrooms:

Step 1: Connect with Your Banzai Representative

Your dedicated representative will guide you through onboarding, branding setup, and school engagement strategies. They'll also help align your partnership goals with your institution's community impact objectives.

Step 2: Review Your Sponsored Schools

Once setup is complete, you'll gain access to the School Dashboard within your Banzai Manager account. There, you can view active schools, teacher contacts, workbook orders, and presentation requests.

Step 3: Plan for Engagement

Use the ready-made tools and presentations in your Manager Toolkit to begin connecting with schools. Plan to attend or host presentations, respond promptly to teacher requests, and explore ways to integrate Banzai into your community outreach calendar.

Launch Plan

Phase One: Internal (Employee Launch)

1. Identify who will oversee the education side of your program. This includes managing relationships with local schools, teachers, and districts, as well as coordinating who will handle presentation requests. This could be a branch manager, education director, or another designated team member.
2. Ask your Banzai representative to enable presentation notifications for this individual so they can stay up to date on incoming requests.
3. Review your existing school relationships. Consider any personal or professional connections employees may already have with the schools you sponsor, or send an internal memo asking staff to share and help strengthen those relationships.

Phase Two: School Outreach

1. Meet with principals at your sponsored schools to begin building or strengthening relationships.
2. Research and connect with curriculum directors, as their support can help drive school-wide adoption if they recommend the program to teachers.
3. When possible, attend professional development days to network, introduce the program, and form positive relationships with educators.

Phase Three: Social Media Launch

1. Use the email templates in the Banzai Manager (found in the School Reports and Teachers sections) to begin communicating with teachers. By clicking on a teacher's name, you can send prebuilt emails such as introductions, workbook order or reorder invitations, and presentation outreach.
2. If possible, visit schools in person to introduce yourself and the program. Take photos during these visits to use in later outreach and social posts.

Phase Four: Social Media Launch

1. Let your community know you're investing in local education by sharing social posts about providing Banzai to nearby schools.
2. Offer course completion certificates to motivate student participation and engagement.
3. Host a parent night to introduce families to the platform and encourage at-home use.
4. Share an introductory social post highlighting the full range of Banzai resources and clearly direct your audience to where they can access them.

In-Person + Virtual Presentations

Access ready-made, age appropriate presentations and handouts on essential financial topics such as budgeting, saving, credit, and debt.

As a school community partner, Banzai encourages teachers to request presentations directly from your institution. When a request comes in, simply use the provided slides and presenter notes to deliver an engaging, financial-focused session.

By leading these sessions, your institution becomes a trusted financial resource, giving students a reliable place to turn for future financial questions and needs.



Frequent Teacher Communication

Streamline outreach with customizable email templates available in your Banzai dashboard. Whether responding to presentation requests, fulfilling workbook orders, or initiating contact with new teachers, communication is simplified and professional.

To:

Awesome Teacher <awesometeacher@banzai.org>

From:

Thea Morris <thea.morris+hometownfinancial@banzai.org>

Choose template:

Choose template ▼

Subject Line

Email

CLEAR

SEND

[Back to Table of Contents](#)

School Usage Reporting

Access school engagement metrics:

- View and manage all sponsored teachers
- Track workbook orders and delivery history
- Review presentation requests and responses
- Access teacher notes and student feedback

Each report is exportable as a CSV, allowing you to easily share insights, identify trends, and tailor outreach strategies.

Teachers you sponsor have ordered a **total of over 800 workbooks.**

800

The workbooks your teachers have ordered have been **75% High school Personal Finance, 20% Middle School Personal Finance, 3% Digital Citizenship, and 2% Elementary Personal Finance.**

Teachers

Here are the teachers your sponsor.

All teachers

Search

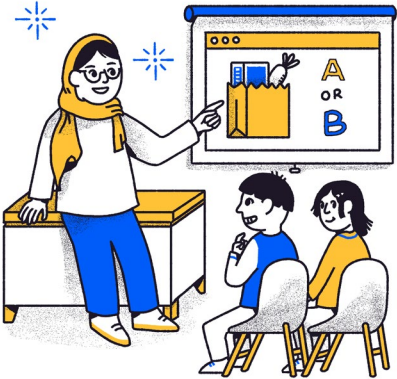
Teachers	Contact	School (District)
Aaliyah Rowland	aaliyah.teachbanzai@gmail.com (555) 929-6306	Big Valley Technical School
Aaron Spencer	aaron.teachbanzai@gmail.com (555) 929-6306	Big Valley Technical School
Allison Graham	graham.teachbanzai@gmail.com (555) 555-5555	Whitewater High
	brody.teachbanzai@gmail.com (555) 539-8494	Golden Sierra Middle School
	brooklyn.teachbanzai@gmail.com (555) 929-6306	Forest Lake Academy

Teacher Development

Banzai supports both teachers and students. Every month, educators can attend two professional development webinars—one live and one on-demand—led by Banzai’s curriculum experts and guest educators.

By participating as a school community partner, your institution is recognized as a supporter of teacher growth and educational excellence.

Upcoming Webinar



1 HOUR PD CREDIT

From Awareness to Action: Empowering Students to Create Safer Schools

📅

Tuesday Oct. 14, 3 p.m. MST

Featuring guest presenter Blair Freedman, Senior Director of Educational Partnerships for Sandy Hook Promise

→

 Help students build stronger connections and prevent social isolation

→

 Learn about Sandy Hook Promises’s signature programs—Start with Hello, Say Something and SAVE Promise Clubs

→

 Create a culture of safety and belonging in your school community

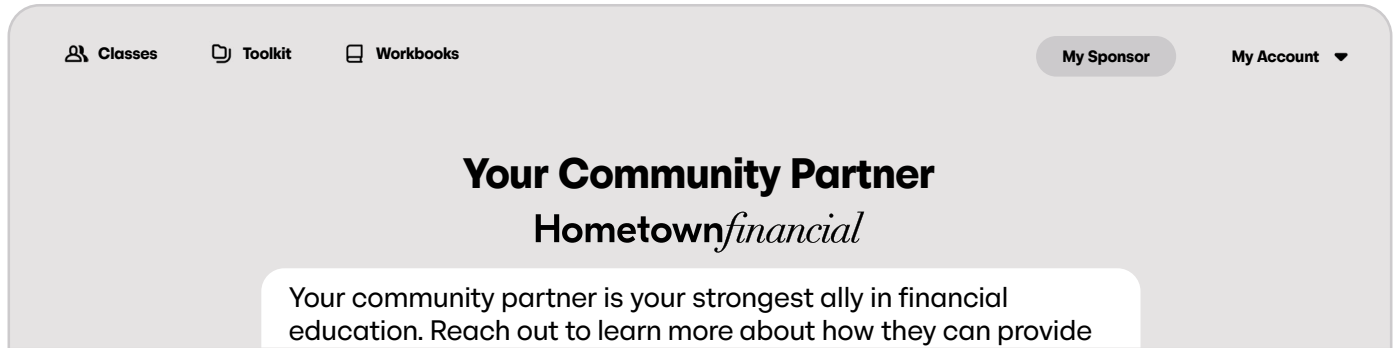
Register Now

Omnipresent Branding

Your institution's logo and name appear throughout the Banzai platform—from the student dashboard to within interactive game elements, meaning students and teachers can always associate financial literacy learning with your brand's support.

Ways your branding shines through:

1. Your logo on the teacher and student dashboard.
2. References to you throughout the games.



Teacher & Student Feedback

Built-in feedback tools let teachers and students share comments, appreciation, and testimonials directly with your team so you can truly see the impact you make. You can also use this feedback to share genuine stories to demonstrate your partnership success.

SCHOOL COMMENTS

Read and share comments from your sponsored school community.

All Schools ▼

Last Six Months ▼

For the last 6 months, across all schools, you've received **0 teacher comments** and **15 student comments**.

COMMENT HIGHLIGHTS

Teacher and student comments highlighted by you or your Banzai Rep.

Student Comment

10/12/2025

Life Scenarios

"One thing I learned in Banzai that I didn't know before is how to create and manage a budget. I learned that keeping track of income and expenses helps you make smarter choices with your money and avoid overspending."

☆ Highlight

Copy comment

Community Product Use & Implementation

[Back to Table of Contents](#)

Getting Started With Direct

Banzai helps your institution meet and maintain company-wide objectives: employee & client wellness, site traffic, service hours, etc. When used at full capacity, Banzai becomes an essential piece of promoting financial wellness in the community.

Now that you're a Banzai partner, here's what you'll do to get started:



Step 1: Send us your logo.

Make sure to send it as an **SVG, AI, or EPS file** to your Banzai Representative. We'd love to have a site designed for you on our very first meeting! The sooner you send your logo over, the sooner our team can start setting up your Banzai site.



Step 2: Get to know your Banzai Representative.

In the days following your Direct sign-up, a Banzai representative will reach out to you. This representative will be your eyes, ears, and voice for everything Banzai related.



Step 3: Implement the Banzai program (indicate page number/last page)!

Remember, your Banzai representative is here to support you every step of the way. These initial calls and meetings are crucial, so **be sure to include everyone who will be actively involved with Banzai in the onboarding process.**

Direct Product Implementation

Here are some things to consider as you begin integrating Banzai into your existing workflow.

Define your goals.

What areas could your institution use support? Whether it be marketing & promoting products, bettering employees' & account holders' lives, tracking product interests, or simply promoting a culture of financial literacy, Banzai can help! So, think about what you want to accomplish first.

Define what employees or team will oversee the program.

You'll need someone that can voice your institution's motivations and concerns to the Banzai team. More than that, Banzai has huge potential in the hands of a dedicated advocate for the community—someone who's willing to find ways to tie this program into existing marketing or service operations:

- Marketing Manager
- Social Media Manager
- Community Relations Manager
- CRA Manager
- Branch Manager
- Human Resources

Define your audience.

Banzai can build and bolster relationships with account holders and partners, strengthen employees, educate communities, etc. Who do you envision serving with this program?

Partners

Create and share a co-branded microsite with community partners—non-profits, businesses, etc.

[Case Study—Brands](#)

Communities

Banzai offers a community-facing website complete with over 200 life literacy resources such as calculators, Coaches, articles, and assessments. Use it to promote services, encourage learning, and motivate change.

[Case Study—Rewards](#)

Employees

Banzai offers the ability to build custom employee pages or a microsite that employees use as a life-literacy learning resource. This feature helps you highlight resources within Banzai that touch on employee benefits and other life-literacy content.

“We implemented the Banzai feature to our employees so they could understand the program and learn more about financial wellness themselves!”

—First Federal Credit Union

Define Communication Channels

How will you let people know about the new resources coming to your site?

- Your website
- Social media
- Member newsletters
- Local news outlets
- Branch Magazines
- Email

Create a Launch Plan (Next Page)

We recommend taking the following steps to ensure a smooth launch of the Banzai product:

1. Outline a full communication plan, including a timeline for each phase.
2. Identify the appropriate “messenger” for each strategy.
3. Brainstorm resources needed (e.g. materials, departments/colleagues).

And to execute:

- Collect necessary material.
- Connect with organizations/partners as needed.
- Draft your communication materials.

Launch Plan

Phase One: Internal (Employee Launch)

1. Meet with your Banzai Representative to plan the launch and include any team members who will help manage the program.
2. Send an internal newsletter announcing the new financial wellness resources and directing employees to their dedicated employee microsite, created with support from your Banzai Representative.
3. Encourage participation by offering an incentive to employees who complete a Reward.

Optional: Host a short training to help employees confidently introduce and discuss the Banzai program with customers.

Phase Two: Non-Profit Partnership Launch

1. Create a custom microsite with existing non-profit partners.
2. Meet with non-partnered non-profits and offer the program using the marketing page found in the “Partners & Brands” section of the Banzai Manager titled “Non-Profits,” and templated email campaigns.
3. Schedule at least two opportunities to educate non-profit participants (either in person or virtually) using the pre-built presentations located in the Banzai Manager.
4. Use custom built email campaigns from launch packet to reach out to existing and new nonprofit partnerships.

Phase Three: Business Partner Launch

1. Create co-branded microsite(s) for chosen, existing business partners with the help of your Banzai representative.
2. Reach out to new potential business partners using the marketing page found in the “Partners & Brands” section of the Banzai Manager titled “Businesses,” and templated email campaigns.
3. Share with them a link to their co-branded microsite.
4. Offer to come discuss ways they could use the Banzai platform with their employees and customers.

Phase Four: Customer/Account Holder Launch

1. Send out newsletters to existing customers regarding your new financial education program.
2. Share a link to the program page on social media or on web banners throughout your own institution’s site to call attention to it.
3. Place the program information within your customers’ account portals.
4. Post a blog announcing the new partnership!

Working with Direct

Banzai Direct helps you promote your brand and serve your community:

Manager Access

Access analytics and downloadable pre-made marketing content.

Analytics

Get user data on web traffic and leads.

Manager Toolkit

One-stop shop for all Banzai resources for Direct partners—marketing materials, presentations, flyers, how-to guides, etc.

External Resources

Add unpublished content of your own—videos, activities, pdfs, and more—to your Banzai Wellness Center.

Wellness Center

A community-facing website complete with over 200 financial and life literacy resources such as calculators, Coaches, articles, and courses.

Collections of Content

Bundle limitless resources together into custom collections to feature on your co-branded Wellness Center.

Featured Content

Highlight specific content on your Wellness Center homepage.

Co-branded Partner Pages

Create and share a co-branded microsite with community partners—non-profits, businesses, etc.

Calls to Action

Add clickable CTAs throughout any of your featured resources.

Offers

Motivate users to take advantage of all the services your institution offers.

Rewards

Incentivize users to complete Banzai courses, assessments, and/or Coach sessions.

Copy and Paste Library

Over 150 Banzai articles and hero illustrations for you to copy and use on your institution's website.

Employee Pages

Build a microsite for employees to use as a life-literacy learning resource for employee specific incentives.

Marketing & Social Media Content

Access pre-made Instagram, Facebook, and X posts, as well as flyers, trifold, and other handouts that help promote your content.

Embedded Content

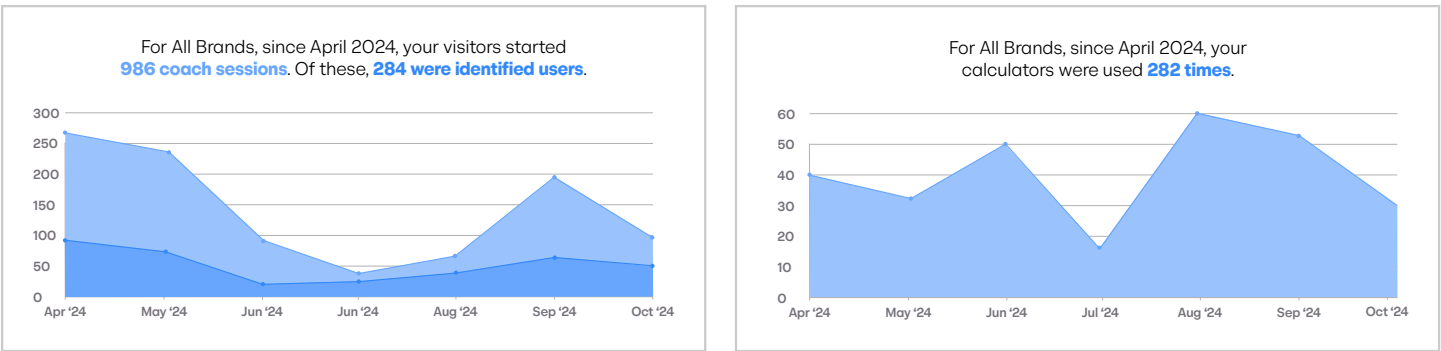
Embed Banzai resources throughout your site: these resources match your branding, ensure users don't have to click away from your site for access, and help improve SEO (Search Engine Optimization).

Navigating the Banzai Manager

The Banzai Manager gives you access to data that monitors your institution’s reach. Some of its features include:

- 1. Data-Driven Insights:** Tailor your institution’s products and offers to meet specific needs within a community based on data that tracks which Banzai resources get used the most.
- 2. Resource Access:** Access marketing collateral, contract information, lead tracking, and more in the Manager and it’s toolkit.

Usability Reports: Gone are the days of navigating the unknown. The Banzai Manager provides usage statistics, meaning you can gain valuable insights into the utilization of Banzai’s resources.



Each reporting feature—article, Coach, calculator, and course reporting—goes over how many times each Banzai resource has been used, identifies activity users, and displays a visual graph so you can easily track overall usage.

Manager Toolkit: The toolkit is a one-stop for content marketing solutions, downloadable and printable resources, and other helpful guides.

THE
MANAGER

Logout

Home

Direct Reports

School Reports

Marketing Materials

Partners & Brands

Embedded Content

Marketing Materials

Banzai provides a marketing toolkit designed to help you promote Direct to community groups and individuals. Co-brand each piece with your own logo. If you need help with your logo, contact your Sponsor Relationship Manager. Materials include:

- Web Banner Packages
- Content Marketing Guide
- Social Media Images

- Final Topic Presentations
- Coach Marketing Kits
- HR Materials & Logos

Visit the Manager Toolkit to download and use Banzai’s marketing materials.

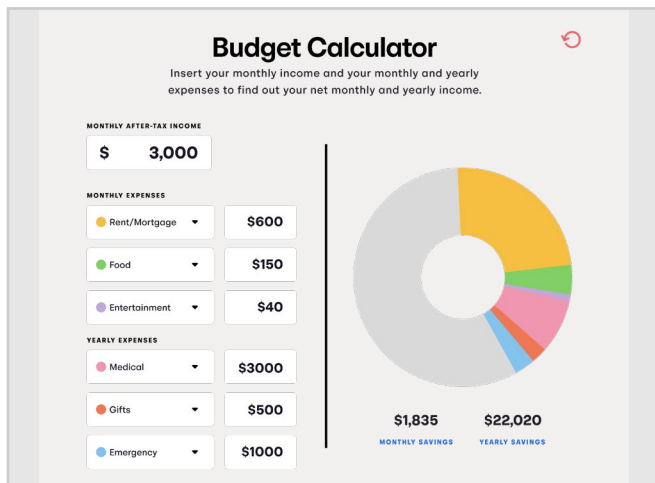
Read more about how to set up a marketing campaign, use Banzai in your social media and more.

The Wellness Center

The Wellness Center is a powerful site complete with over 200 hours of financial and life literacy resources such as calculators, Coaches, articles, assessments, and courses. The Wellness Center is customizable, co-branded with your institution's and Banzai's logo, and shareable.

Calculators

Simple, well-designed, and practical calculators that help users make a budget, predict loan payments, and more.



Coaches

Interactive, step-by-step virtual activities that help users navigate specific financial situations, offering actionable tips along the way.

First, enter your debts one at a time.

What type of debt is it?

How much do you owe on this card?

\$

What is the interest rate on this card?

%

What is your current minimum payment?

\$

Articles

Easy-to-read articles that break down essential financial topics, including budgeting, credit, insurance, and more.

Health Savings Accounts

In this article:

[Coach: Make the Most of Your FSA or HSA](#)

[f](#) [x](#) [v](#)

Minimizing out-of-pocket medical expenses is tough when you have a high deductible health plan, but a health savings account can help. A health savings account (HSA) is a savings account where pre-tax money is deducted from your paycheck and pooled for medical expenses. Then you can use the money for qualified medical expenses, like deductibles, copayments, dental or vision costs.

Courses

Real-life simulations that are great for kids, teens, and young adults to teach basic and advanced life-literacy concepts.

Game

Bills

Credit

Vocab

Badges

City Water LLC
Time to pay up! Do no pass Go. Do not collect \$200.
Total Gallon Usage: _____
Service Charge: _____
Consumption Charge: _____
Sewer Charge: _____
Power Factor Penalty: _____
Total Amount Due: \$50.98

Electric & Co.
pay up! Do no pass or collect \$200.
Charge: _____
arg: _____
td: _____
arge: _____
or Penalty: _____
State: _____
Total Amount Due: \$69.99

Bani! You got slammed with utility bills. Will they ever let up? You used online bill pay (Checking). Add the amounts, and record on payment.

ACCOUNTS

Cash \$50.00

Checking \$1,234.56

Credit Card \$0.00

Integrating External Resources

Customize your Wellness Center further by adding unpublished content of your own—blogs, articles, etc. When adding an external resource, a titled card will appear with the rest of the content an illustration will be automatically populated. Once a user clicks the card, it directs them to your resource.

How to add external resources:

Email the following information to your Banzai Representative:

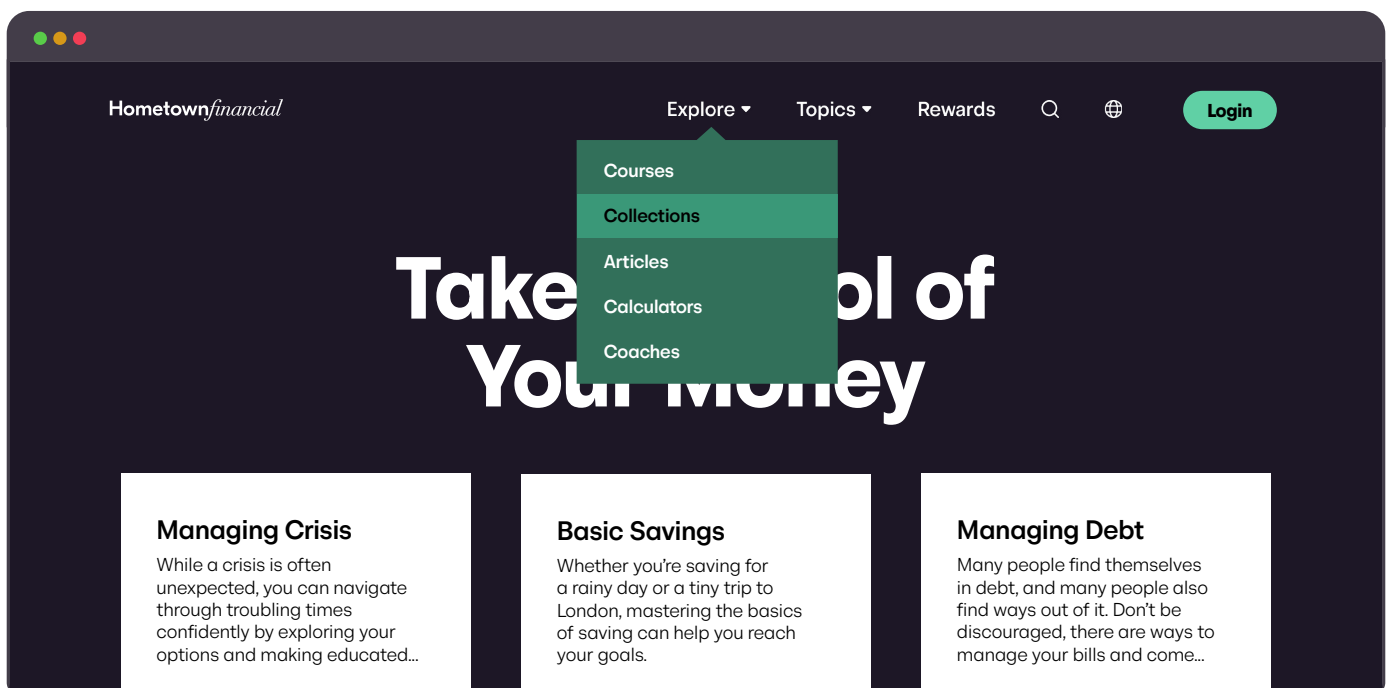
- Title for the resource (35 character limit).
- Description of the resource (110 character limit).
- Copy/Create a link to the resource.

Collections of Content

Main Page: Banzai has already created over 40 different collections. Each collection focuses on a single life-literacy topic. You are able to choose up to 3 collections of content to highlight at the top of your Wellness Center homepage. These collections can be switched out as often as you'd like with the help of your Banzai Representative.

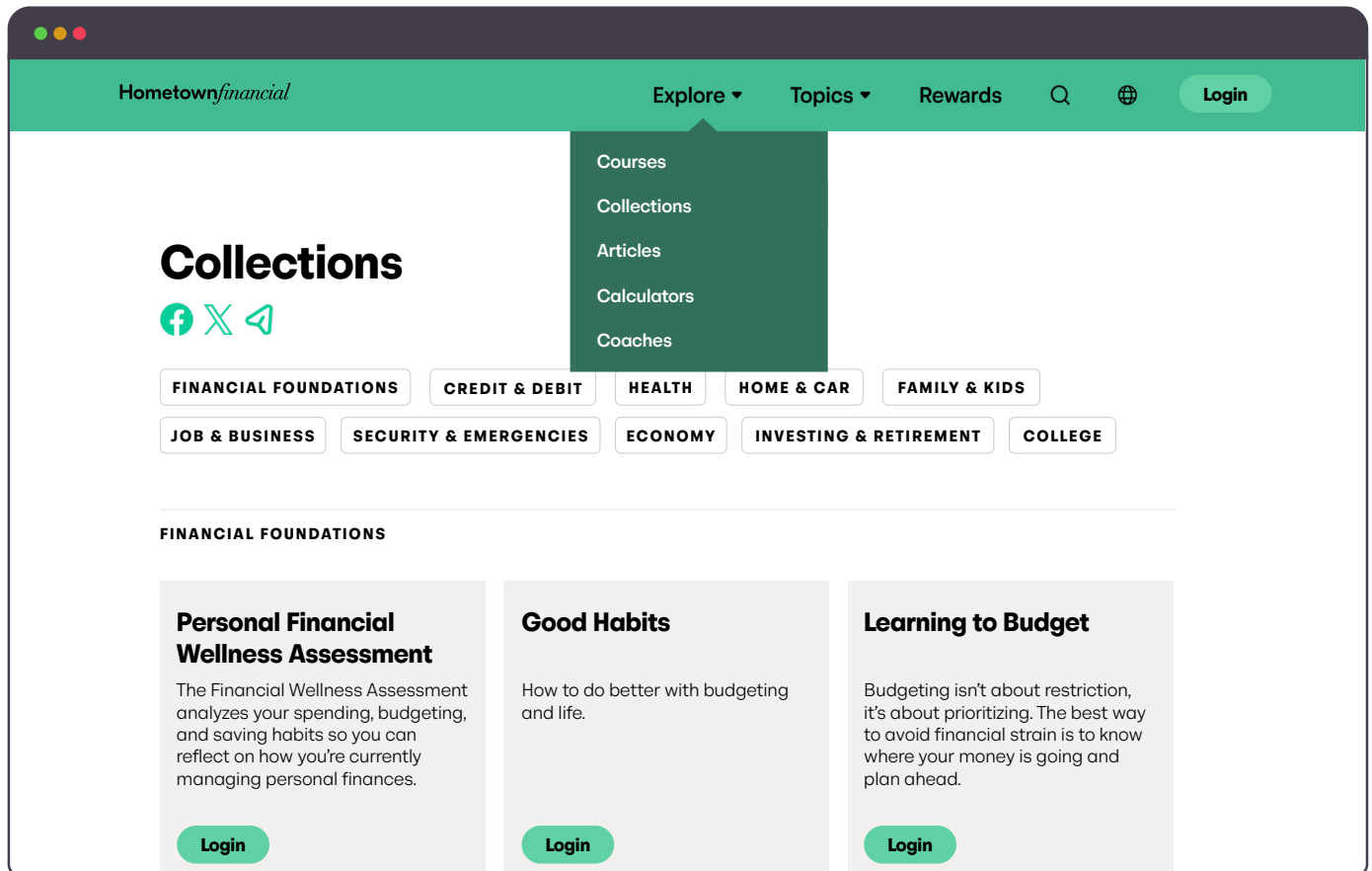
How to find collections of content from your Wellness Center view:

1. Select the Banzai Direct Tab in the Banzai Manager.
2. Click “Explore” at the top of the Wellness Center view.
3. Select “Collections” to view the already loaded collections available to you.



How to add collections of content to the main page of your Wellness Center:

1. Choose 1-3 collections of content to feature on your homepage
2. Email the list to your Banzai Representative.



Custom Collections: Your Banzai Representative can help you build a brand new collection of content suited for any topic, audience, or event. These custom collections can be featured on your home page in place of any pre-made Banzai collections.

How to request customized collections of content:

Email the following information to your Banzai Representative.

- Title (around 40 characters).
- Description (around 240 characters).
- Choose 1-10 resources to include in the collection.

Featured Content

You can highlight individual resources by displaying them prominently at the top of your Wellness Center home page.

By default, this section auto-populates with some of the most popular Banzai resources. However, you can select specific resources to display.

How to request featured content:

1. Choose 1-8 resources—Coaches, articles, courses, and/or calculators.
2. Email the list to your Banzai Representative and let them know you'd like to feature these resources on your Wellness Center homepage.

Calls to Action

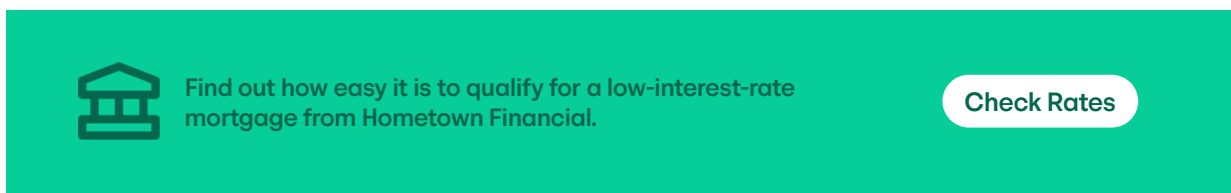
Add clickable CTAs or prompts throughout any featured resources. CTAs encourage users to act on what they learn in Banzai resources and are a great way to offer relevant financial products, and services. They can be customized and added to any individual resource.

There are two ways you can present CTAs in the Wellness Center:

Top Banner: An unobtrusive bar that shows when users start scrolling down on a resource page. It appears at the top of a resource and urges the user to either visit a part of your institution's website or submit their contact information for a personal follow-up from a financial expert within your organization.



Footer: Similar to the banner, the footer is a bar at the bottom of the text that encourages the user—after reading the resource—to find relevant institutional products and services.

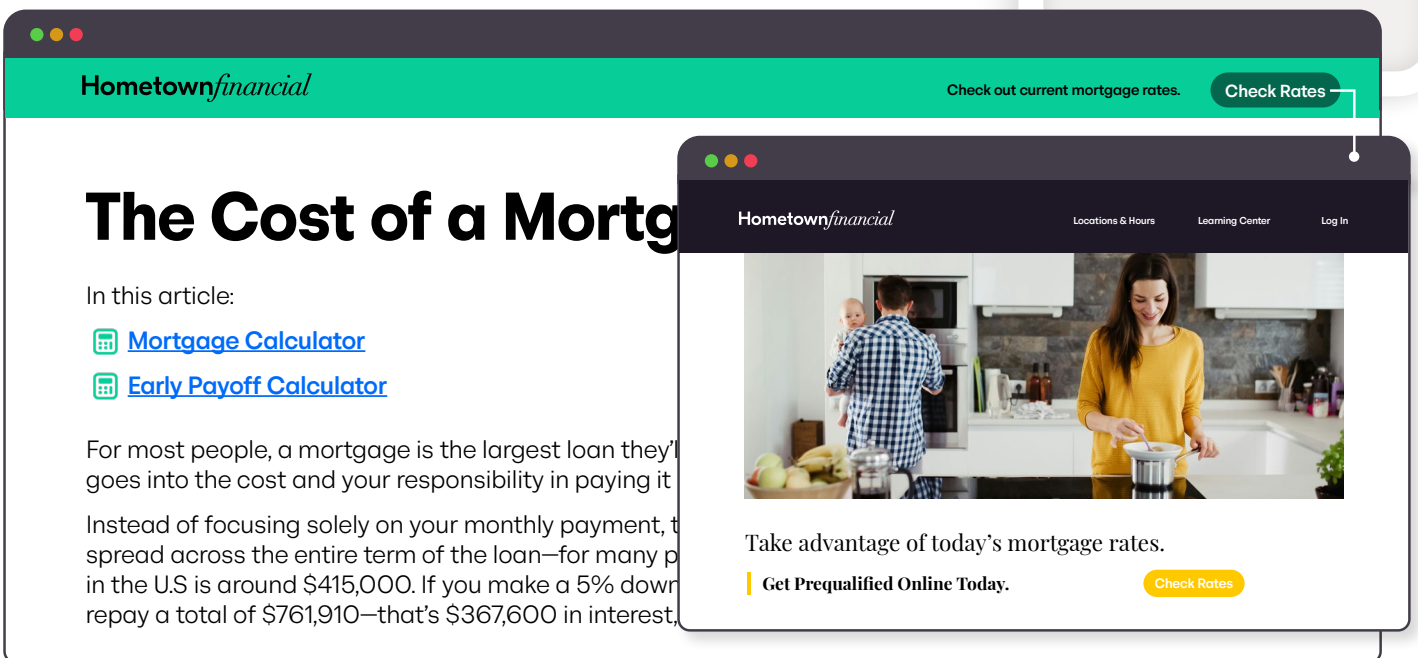


CTA Outcome Options: Each of the CTA options has one of two outcomes: **a pop-up title and text** or **an external link** to a website, pdf, video, etc. These outcomes can vary between pages but never within the same page.

- 1. Pop-Up Title:** When the user clicks the CTA, a pop-up window appears that asks the user to enter their contact information.
- 2. External Link [Website, Pdf, Video, Etc.]:** When the user clicks the CTA, this CTA acts as a link to your webpage or website.

Any CTA lead is automatically emailed to a designated contact at your organization and recorded in the **Leads** section of the Banzai Manager. Banzai also offers default CTAs, which your Banzai Rep can activate for you upon request if you prefer not to create your own.

If you'd like to make a custom CTA, the steps to do so are listed below.



How to create a Pop-Up CTA:

Email the following to your Banzai Representative:

- Header text (48 character limit).
- Footer text (173 character limit).
- Button (17 character limit).
- Title for the pop up (16 character limit).
- Text for the pop up (173 character limit).

How to create a CTA that links to a website:

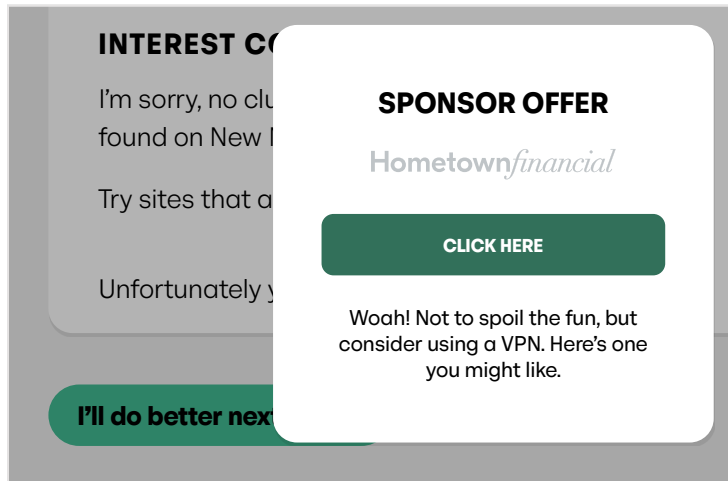
Email the following to your Banzai Representative:

- Header text (48 character limit).
- Footer text (173 character limit).
- Button (17 character limit).
- Link to where the CTA should send users.

Offers

Offer products or services to people who complete courses, Coaches, or other Banzai activities. Direct lets you do this in the form of Offers. Offers can appear in a series of designated places throughout any of the interactive Coaches or courses within the Wellness Center.

Your Banzai rep can also send you an excel sheet/guide that can help plan offers across your site.



Offer Outcome Options: Offers have one of two generated pathways: a pop-up title and text or external link. These outcomes can vary between resources.

Pop-Up Title: When the user clicks the Offer, a pop-up window appears that asks the user to enter contact information.

Link to a URL: When the user clicks the Offer, it acts as a link to a URL for a pdf, web page, etc.

Here are the steps to customize offers according to the above pathways:

How to create a Pop-Up Offer:

Email the following to your Banzai Representative:

- Header text (48 character limit).
- Footer text (173 character limit).
- Button (17 character limit).
- Pop-up title (16 character limit).
- Pop-up text (173 character limit).

How to create an offer that links to a URL:

Email the following to your Banzai Representative:

- Header text (48 character limit).
- Footer text (173 character limit).
- Button (17 character limit).
- Provide a link to where the offer should send users.

Rewards

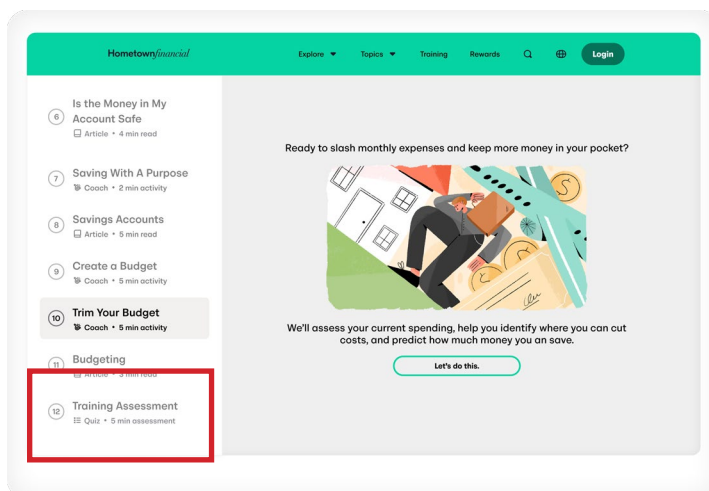
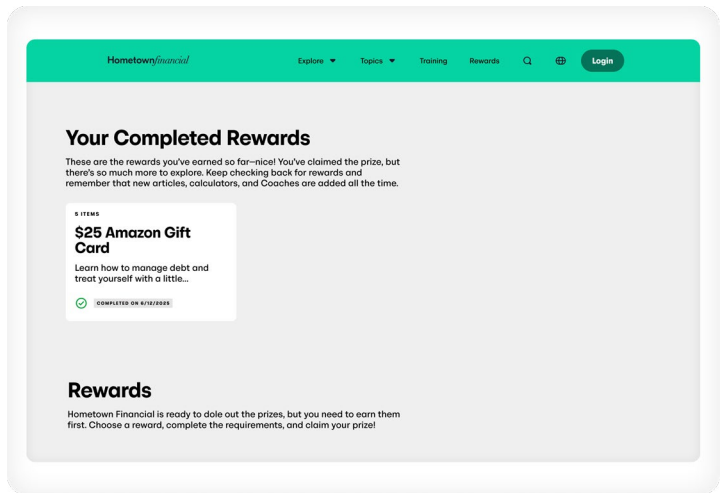
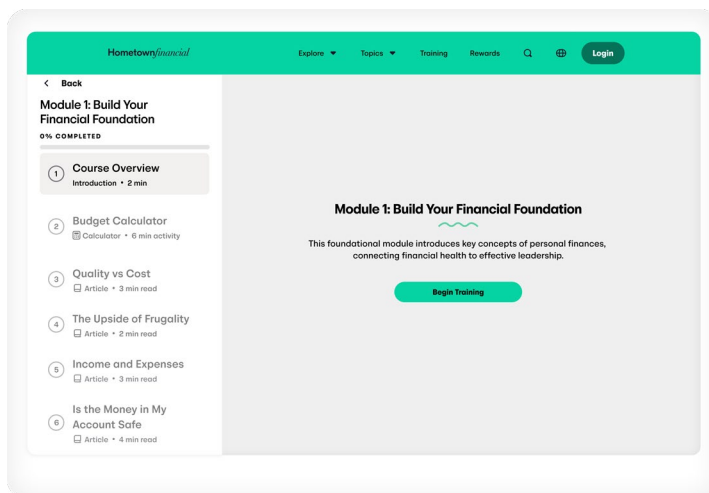
The Rewards feature allows you to motivate users by offering incentives for completing a set of Banzai resources—such as articles, calculators, courses, or Coaches. If you prefer not to offer incentives, you can instead create a guided path of recommended resources to help users prepare for major financial milestones.

Rewards can be added, updated, or removed at any time—whether monthly, seasonally, or on your own custom schedule. Progress is not tracked in the Manager. Instead, a designated person on your team will receive a weekly email summary showing which users completed which Rewards.

Here are the steps to adding a Reward to your Wellness Center:

Email the following to your Banzai Representative:

- Title for the Reward (35 character limit).
- Reward description (110 character limit).
- A list of resources that should be included for each reward.
- Include in your email if you want a quiz at the end of each session. And how you want the reward to appear in the interface: as a training, as a reward, as a journey, etc.



You may also include an optional quiz to ensure users are engaging with and retaining the material.

To implement, email the following to your Banzai Representative:

1. A quiz title & subtitle.
2. A quiz description.

Embedded Content

Embedded content allows you to give users access to brand-focused resources or content that aligns with your institution's cause. Utilizing this feature means that your own site's visitors can read, interact with, or use Banzai tools without clicking on an outside link as if they're a part of your very own blogs, articles, and resources.

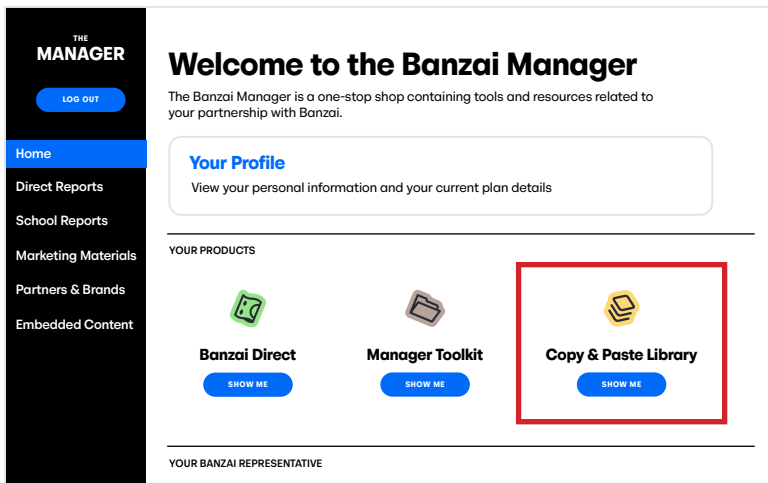
Within the Manager Toolkit, you'll find step-by-step instructions for embedding resources anywhere on your site. You can choose between **JavaScript** or **iFrame** options by navigating to the **"Embeddable Content"** section and selecting the specific resource you want to embed.

Once embedded, the content will automatically update to match the fonts and colors you've selected within the Banzai Manager under the Embedded Content tab. There's also an interactive section in the Manager where you can preview and experiment with different font and color selections. Please note that any permanent changes to these styles must be made through your Banzai Representative.

How to embed resources on your institution's site:

1. Log in to the Banzai Manager
2. Click Embedded Content on the left-hand side of the screen
3. Select "Learn more about embedded content in the Manager Toolkit."
4. Scroll down and select which resource you'd like to embed—calculator or Coach.
5. On the next page, navigate to the specific resource you'd like to embed onto your site.
6. Follow the instructions given on that page.
7. Be sure to email your Banzai Representative with the font and color selections you'd like applied to your embedded resources. These choices can be reviewed and previewed in the **Embedded Content** tab within the **Banzai Manager**.

The Copy and Paste Library



The copy and paste library includes over 150 Banzai resources that you can copy and use in your institution's website, social media campaigns, blog posts, newsletters, and more. This library is located on the homepage of the Banzai Manager:

Copy, revise, and paste as you see fit!

If done right, you can even improve your own site's SEO by including an attribution link —***{your-subdomain}.banzai.org/wellness/resources/{page}***—back to your subdomain.

How to include an attribution link:

Attributing the copied content on your website improves your site's SEO by signaling to search engines that your content is credible and preventing duplicate content penalties.

1. Add a canonical tag to the code on your webpage.

Add the following code to the **< head>** section of the page. Adjust the link to the copied version of the article on your website's wellness center:

```
<link rel="canonical" href="https://{your-subdomain}.banzai.org/wellness/resources/{page}" />
```

In some instances, you may be able to just edit an existing canonical tag on your page.

2. Or, add the attribution as text to the web page.

If you don't have access to the underlying code powering your webpage, you can simply add a statement of attribution at the bottom of the page:

"This article has been republished with permission. View the original article: {Article Title - Linked}"

Make sure to link back to the actual source content on your Wellness Center. (***e.g. {your-subdomain}.banzai.org/wellness/resources/{page}***)

Marketing Content

Banzai has created a variety of Marketing Kits that you're welcome to use for social media and email campaigns. Each kit contains up to 8 ready-to-use social media posts with images.

You can find these kits in the **Direct Marketing Materials** tab of your **Manager Toolkit** (located on the homepage of the Banzai Manager).

To help you get started, we've provided a list below of some holidays that you can use to map out marketing campaigns moving forward.

Marketing Sample Schedule:

January 1st	New Years Resolutions--Budgeting Marketing Kit
January 19th	National Investor Risk Management Day--Investing Marketing Kit
February 1st	Identity Theft Awareness Week(1/30-2/3)--Article: Preventing Identity Theft
February 15th	Tax Prep--Tax Season
March 1st	National Credit Education Month--Credit Marketing Kit
March 21st	Credit Card Reduction Day
April 1st	Fin Lit & National Teach Children to Save Day--Financial Literacy Marketing Kit
May 1st	National Small Business Week (4/30-5/6)--Building a Business Marketing Kit
June 1st	National Homeownership Month--Buying a Home Marketing Kit
June 28th	National Insurance Awareness Day--Insurance Resources (send June 15th)
July 1st	National Make a Difference to Children Month--Life Changes Marketing Kit
August 1st	National Financial Awareness Day (August 14th)--Financial Literacy Marketing Kit
August 21st	National Senior Citizen Day--Retirement Marketing Kit or Transitioning to Retirement, Wills, Life Insurance, Scams Targeting Seniors.
September 1st	College Savings Month--College Marketing Kit
October 1st	Cyber Security Awareness Month--Cybersecurity Marketing Kit
October 16th-22nd	National Estate Planning Awareness Week--Estate Planning Checklist
November 1st	Holidays/Holiday Shopping--Holiday Budgeting Marketing Kit
November 16th	Use Less Stuff Day--Article: The Upside of Frugality
December 1st	End of the Year Auto Loan Deals--Buying a Car Marketing Kit

Customizing Your Wellness Center

Your Wellness Center should reflect your brand, and it's easy to make it feel like your own. Here's what you can personalize:

Colors

Match the button and dropdown colors to your own primary and secondary brand colors.

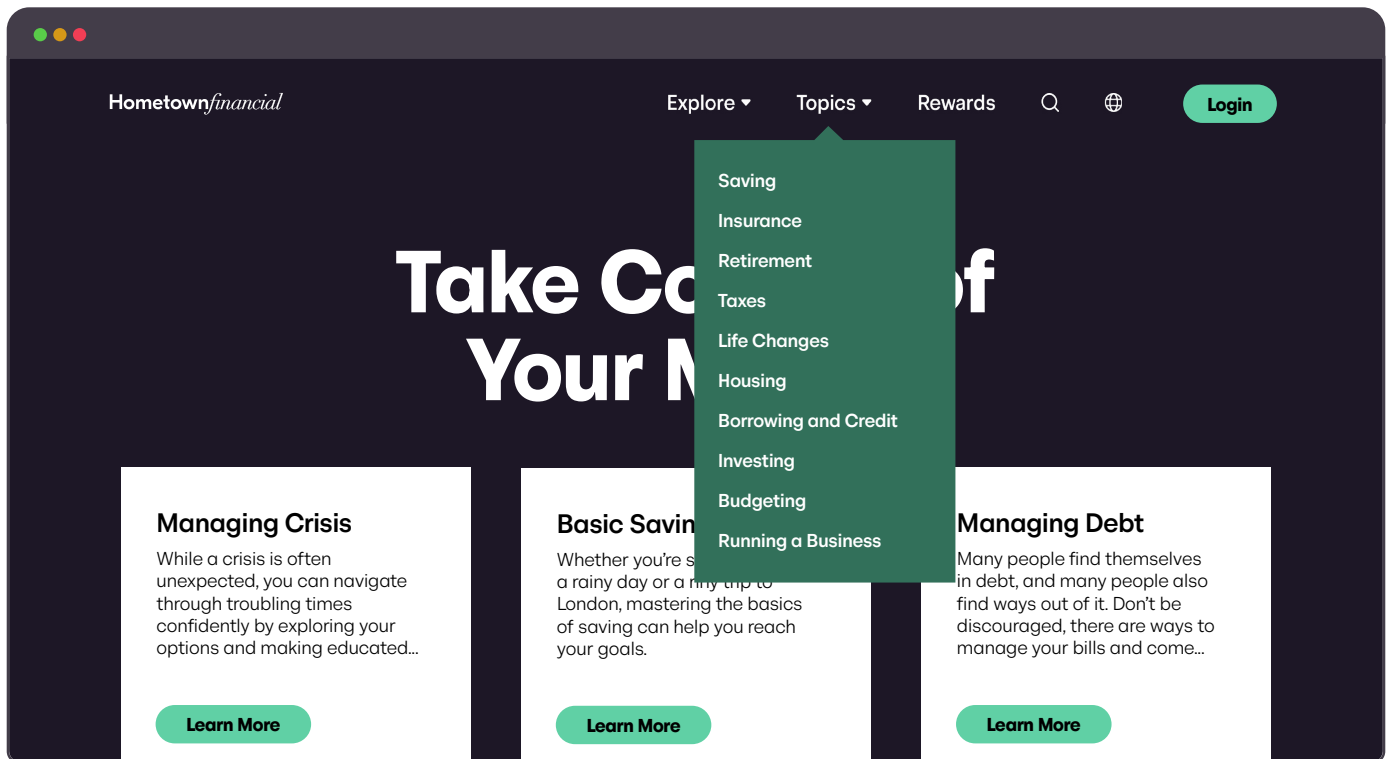
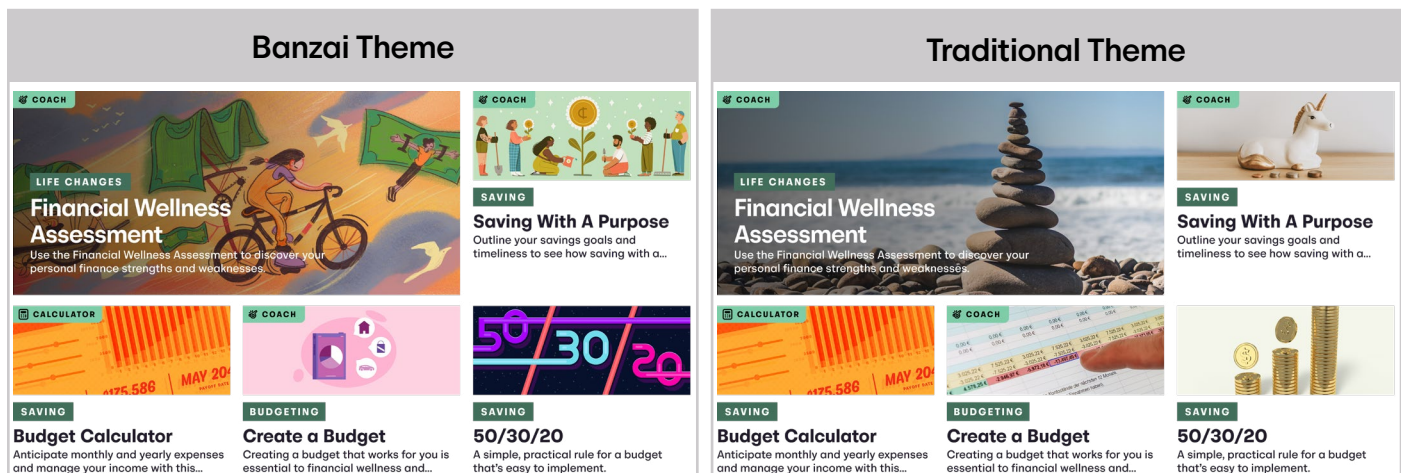


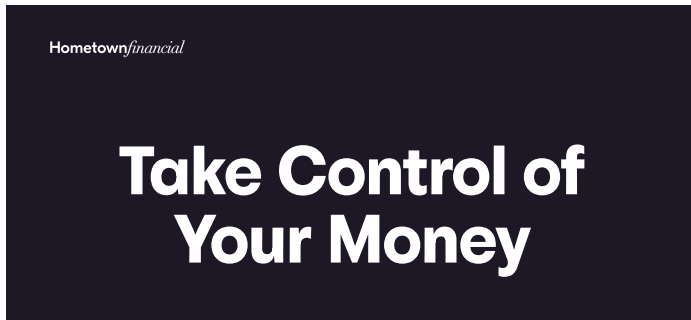
Illustration & Artwork Style

Pick a visual style that fits your brand: the playful, illustrated Banzai Theme or the polished, photo-based Traditional Theme.



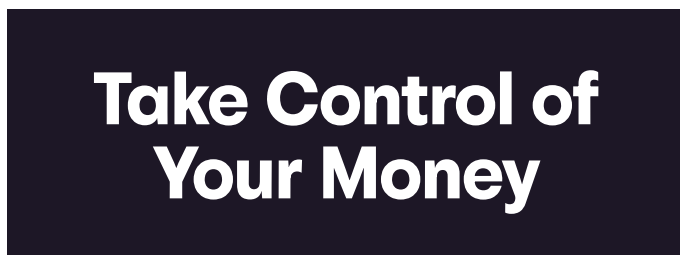
Background

Choose between a light background with your full-color logo or a dark background with your white logo for contrast.

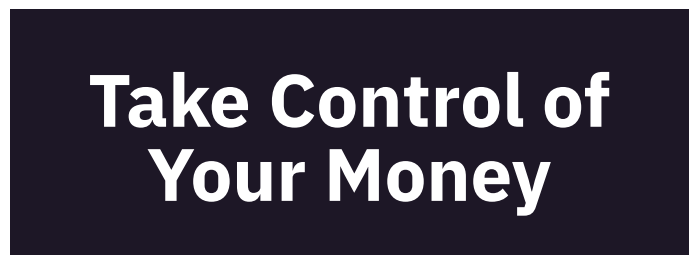


Font

Select from six font options to complete your branded experience.



Cardinal Grotesque (Banzai)



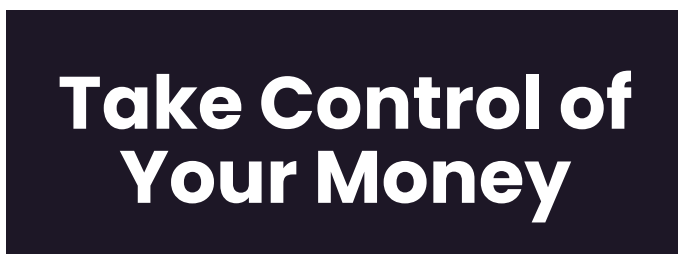
Ibm Plex Sans



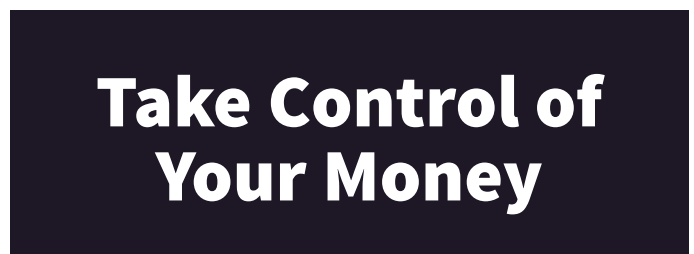
Frank Ruhle Libre



Playfair Display



Poppins



Source Sans Pro



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