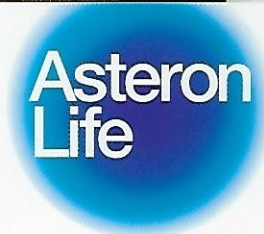



# Asteron Life Professional Marketing Series







We understand how time constraints can stop you from focussing on your core service offering of providing advice. We also know that lead generation and ongoing service of your clients are important to you but these activities are time consuming and require support.

That's why we created the 'Asteron Life Professional Marketing Series'. This is an integrated, flexible suite of tools to help you do anything from a simple client mail out to an end-to-end marketing campaign. The tools are designed to help you promote your services to specific segments of your client base such as the small business market, medical professionals, tradesmen or blue collar workers.

You can access everything you need via the Marketing Materials section on the Asteron Life Adviser website.



# The Asteron Life Adviser website

Inside the site you'll find a suite of tools to support you at every stage of the advice process. It's an extra resource for your business.

This is a living site, where information is maintained to reflect changing legislation and ongoing activities at Asteron Life. We will continue to upload new documents and tools as we produce them, so log in regularly and look out for new campaigns and material.

And remember, this is your site, so please share your ideas and feedback with us via your Asteron Life Sales Manager, so we can continue to keep it relevant to you and your business.

Let's take a closer look at the Asteron Life Professional Marketing Series and what else you can find on the site.

## Inside the site

The marketing material on the Asteron Life Adviser site is designed to assist you at various stages of the advice process. Use the tools provided to simplify your marketing activities so you can spend more time doing what you do best – offering high quality, personalised advice to your clients.

## How to access the site?

Simply login to the Adviser website via [www.asteronlife.com.au](http://www.asteronlife.com.au) – with your username and password. If you require a username and password simply ask your Asteron Life Sales Manager.

Once you've logged in, click on the 'Marketing Material' tab at the top of the page. The site has been set out so that you can easily navigate your way through the advice process, by choosing from the following categories:

### Generate business

Find and attract new clients to your business and tap into opportunities in your existing client base. The tools in this section incorporate an educational message to highlight the value of your advice.

### Initial client meeting

Engage your clients early in the relationship by customising your client meetings and really make an impact. By getting to know your clients better, you can implement a strategy tailored to their particular financial needs and goals.

### Technical information

Use client-facing technical strategies in client meetings, or when you're implementing your advice.

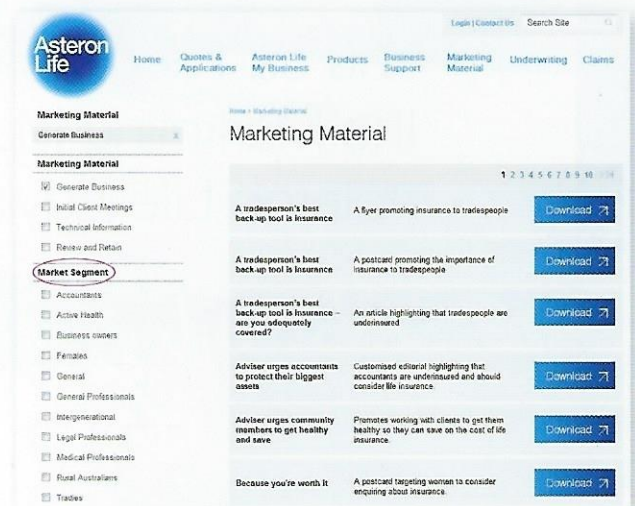
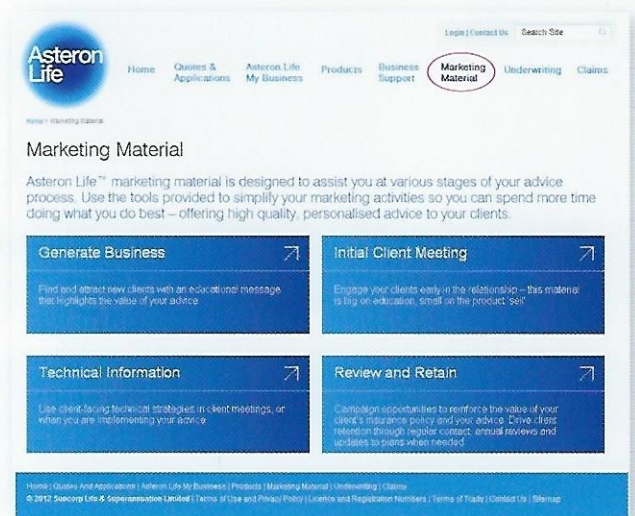
### Review and retain

Differentiate your offer and reinforce the value of your client's insurance policy and your advice. Use these tools to efficiently drive client retention through regular contact, annual reviews and updates to plans when needed.

Once you select the section you're after, you will be taken to another page showing you the tools available for that part of the advice process.

The site lets you easily filter by market segment and document type. From this page you can also change the section of the advice process you need. It's easy. Simply select the category for which you'd like supporting marketing materials from the menu on the left hand side of the screen.

Once you decide which document you'd like, click the 'Download' button.





# Your own unique marketing tools

Within the site you'll find the following marketing tools, ready for you to download and personalise.

## Letters and emails

Customise and edit letter and email templates to help you capitalise on opportunities among existing and potential clients, and ensure your client plans stay up to date with your clients' changing circumstances.

## Brochures and flyers

Use these client-friendly flyers to demonstrate the importance of insurance.

## Articles

Position yourself as a subject matter expert and use editorials to build your credibility through the press.

## Postcards

Promote your brand and position yourself as an adviser of choice with ready-made print ad templates. These can also be printed and used as postcard flyers to mail to existing clients.

## Presentations

Add value and structure to client 'one-on-ones' in your office or in a seminar or workshop environment. Use these topical presentations to educate your clients and help understand the value of your advice.

## Seminar kit

Seminars are a great way to attract new clients, maintain relationships with existing clients and uncover up-sell and cross-sell opportunities. Conduct regular seminars to strengthen your existing client relationships and further build your credibility as an advice provider.

We've provided all the tools you need to run a successful seminar – all you need to do is bring the audience!

- Invitation templates
- Template cover letter to accompany the invitations
- Feedback form templates
- Template follow-up letters
- Client presentations
- Seminar checklists.

Your brand, your campaign.  
All the materials on this site can  
be customised with your own  
brand. Talk to your Asteron Life  
Sales Manager to find out how.

# Getting more bang for your marketing buck

## Asteron Life Professional Marketing Series

The Asteron Life Professional Marketing Series gives you tools to implement anything from a simple client servicing drive to a full-scale marketing campaign.

By segmenting your client base and utilising the tools provided you can deliver tailored campaigns designed to maximise your marketing spend.

The types of campaigns outlined here can be rolled out to an existing client database or used for a prospective market segment.

## What segments can I target?

The Asteron Life Professional Marketing Series gives you insights into a few key market segments. And the marketing support tools you need to get these clients into your office.

Using the series you can now get your share of these growing markets:

- Accountants
- Business owners
- Females
- General professionals
- Intergenerational
- Legal professionals
- Medical professionals
- Rural Australians
- Tradespeople

The tools available for these segments can be found on the Adviser site via [www.asteronlife.com.au](http://www.asteronlife.com.au).

The Asteron Life Professional Marketing Series gives you tools to implement anything from a simple client servicing drive to a full-scale marketing campaign.

## Devising your plan of attack

Planning a campaign needs to be done with your time, budget and staff resources in mind. Whatever approach you choose, it's important to have clear objectives for your campaign. And to ensure your results will be measurable.

Your Asteron Life Sales Manager can help you work through any issues, and put together a campaign that's right for you.

The following information shows you some of the different ways a campaign can be done – ranging from a low-cost mail out to a high-contact client seminar.

Planning a campaign needs to be done with your time, budget and staff resources in mind.



## Existing client campaign

For established advisers who want a quick and effective way to approach their existing client base about new products or strategies.

- Combine with an existing regular mail out
- Pro-active follow-up, if time permits
- Passive approach, if time is limited.



### Protect your growing business

When you start your own business, a lot goes on your mind. Business ideas, marketing, employee issues – they all depend on your ability to keep working. That's why your financial support. And, most importantly, your family.

By combining Business Education and Insurance Protection insurance you can cover your Business costs, and up to 50% of your personal income, if you can't go to work because of sickness or injury.

And to make sure the insurance you use works for you.

To make sure your family and your business have the cover they need, call my office on 01203 300000.

Advisor logo

British Mail letter - existing the clients - please remove

Dear [Name],

Your life and career are on the move. But is your insurance plan keeping up?

As a working professional you know how important your health is to your career, and to your family. It's vital that the insurance you have in place covers the risks you face while you work.

With an existing career progression, and your home life changing, you need to make sure your insurance is keeping up with you.

A new job, a bigger mortgage, an addition to the family – the bigger your lifestyle, the more protection you need. That's why we recommend you have your life insurance plan every year or so.

Make an appointment for an obligation-free review of your life insurance

If you think you might have over-grown your insurance, or you'd like to find out more about the other ways it covers your situation, let us make an appointment by calling 01203 300000.

Together, we'll look at your options, and make sure you've got the protection you need – in the most cost-effective way possible.

Yours sincerely,

Advisor name

Practice name  
Address  
Address  
Postcode  
Tel  
Fax  
E-mail

The information on this document is for general information only. It does not constitute an offer of insurance. It is not intended to be used as a basis for any insurance policy. It is not intended to be used as a basis for any insurance policy. It is not intended to be used as a basis for any insurance policy.

## Quick hit campaign

For advisers who want to enter, or get a stronger foothold in, a certain market with a limited campaign that won't compromise existing sales activity.

- Limit mail list to a manageable quantity
- Preferably plan a follow up call to maximise result
- Use this approach to 'test the waters' without over-committing.



### You've earned it. It's now time to protect it.

When you work as a professional or executive, you've got every right to feel confident about your financial future. But are you doing everything you can to protect it?

With a comprehensive life insurance plan, you can cover your income, your debts, and your lifestyle – protecting yourself and your family financially from sickness and injury.

To get an obligation-free assessment of your life insurance needs, call my office on 01203 300000.

Advisor logo

Large

Who's got you covered?  
Insurance for professionals

## Occupational focus campaign

For advisers who want to take a specialised approach that capitalises on knowledge of specific segments e.g. medical professionals, tradespeople.

- Assess your time commitment and resources carefully
- Research specific market needs and product benefits relating to segment (e.g. needle stick injury benefits for medical professionals)
- Set firm targets to motivate action
- Allocate sufficient time for follow-up and presentations.



### A tradesperson's best back-up tool is insurance

Subsistence is a term you may not hear every day, but it's one you should know. It's the money you need to cover your living costs when you can't work because of sickness or injury.

That's why you need cover that goes beyond the work you do and the usual risks you face.

With a comprehensive life insurance plan, you can cover your income, your debts, and your lifestyle – protecting yourself and your family financially from sickness and injury.

To get an obligation-free assessment of your life insurance needs, call my office on 01203 300000.

Advisor logo

Advisor logo

Who's got you covered?  
Insurance for the medical professional

## Seminar campaign

For advisers who want to stake a major, long-term presence as a specialist in the chosen market.

- Examine your business orientation
- Ensure you/your staff have seminar implementation skills
- Extensive planning for follow-up and post-seminar sales presentations
- Project detailed costs and sales results needed for successful implementation
- Ensure product and market knowledge is well honed.

Who's got you covered?  
Insurance for the small business owner

Presented by advisor name  
[day, month, year]

Dear [Name],

Thank you for attending the [Seminar Name] on [Date] at [Venue]. I hope you enjoyed it and that you found it useful.

As a small business owner, you know how important your health is to your business, and to your family. It's vital that the insurance you have in place covers the risks you face while you work.

With an existing career progression, and your home life changing, you need to make sure your insurance is keeping up with you.

A new job, a bigger mortgage, an addition to the family – the bigger your lifestyle, the more protection you need. That's why we recommend you have your life insurance plan every year or so.

Make an appointment for an obligation-free review of your life insurance

If you think you might have over-grown your insurance, or you'd like to find out more about the other ways it covers your situation, let us make an appointment by calling 01203 300000.

Together, we'll look at your options, and make sure you've got the protection you need – in the most cost-effective way possible.

Yours sincerely,

Advisor name

Practice name  
Address  
Address  
Postcode  
Tel  
Fax  
E-mail

The information on this document is for general information only. It does not constitute an offer of insurance. It is not intended to be used as a basis for any insurance policy. It is not intended to be used as a basis for any insurance policy. It is not intended to be used as a basis for any insurance policy.

When and where?

Date: [Date]  
Time: [Time]  
Venue: [Venue]  
Parking: [Parking]  
Refreshments: [Refreshments]  
R&BP: [R&BP]



## Tips for running a campaign

Mailouts	
<b>Make a budget</b>	Work out how much your campaign will cost in terms of hours, printing and postage. Then work out a break-even point in terms of sales.
<b>Set a goal</b>	Don't expect miracles! A good direct mail campaign might get a 1% or 2% response rate, so be realistic with your expectations. You can expect higher response rates if you are mailing to existing clients and if you make follow-up phone calls. (see 'Follow it up' below)
<b>Plan your resources</b>	Depending on the size, a mailout can require extra time and resources – a luxury you may not have in your business. Consider hiring a temp for a day or two to get it done in one hit.
<b>Consider staggering</b>	If a large one-off mailout is impractical for capacity or financial reasons, consider dividing your mailing list and staggering your campaign over the year.
<b>Check your data</b>	A mailout will be most effective if it's going to the right people. If you don't have up-to-date client details, consider mailing only clients whose records have been updated recently to minimise returned mail. Use every opportunity to update your client records – some campaigns are run solely for this purpose.
<b>Personalise your letters</b>	A mail merge can help put your clients' details in the letter (where applicable) – making it more personal. You can access mail merge in Microsoft Word. Always check every letter before it's posted for any obvious name or address errors or misplaced fields.
<b>Smaller is cheaper</b>	Sending DL envelopes is cheaper than A4. There are weight restrictions that apply to each, but generally a DL will cost \$0.50 and an A4 \$1 per envelope.
<b>Have a call to action</b>	Whatever you send out, make sure your phone number and address details are clear. Also ensure your receptionist/office team is briefed on the campaign and can facilitate the desired action.
<b>Follow it up</b>	A phone call a week or two after you send the letter can increase your chances of success. It also gives you an opportunity to answer questions if they arise.
<b>Measure your results</b>	Use a spreadsheet to keep track of new business that's related to the campaign, with figures/estimates of the additional revenue it brings in. Compare the results to the money you spent running the campaign. You'll find it doesn't take many additional sales to cover your costs.
<b>Review your campaign</b>	Document what worked, what didn't, and how you could potentially improve your campaign next time.

Talk to your Sales Manager today about how Asteron Life can assist you with the right tools to run a campaign, so you can focus on giving your clients high quality financial advice.