**Marketing Content Brief**

The purpose of this brief is to assist you in writing clear, concise and targeted content for your marketing communications, that align with and help meet your objectives.

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| **Brief date** | 19 October |
| **Title** | Annual Review Campaign – email one |
| **Due date** | 7 Nov |
| **Target audience** | **Existing Gen Y clients** *(Please note this is a brief description of this target audience, and is for example purposes only. For best results the more information you know about your target audience the better)** Younger clients up to mid-30s
* 55/45 split men vs. women
* Primarily made up of professionals and small business owners.
* Most are well established in their chosen careers
* For those that own their own business, most are still within the first 2-5 years of starting their business
* Many have young, or are wanting to start families
* May have or are thinking of buying their first home
* Concerned their long-term financial security
* Due to where they are in life they are relatively new to insurance, and financial planning and most have only been clients for 1-2 years
* For many this will be their first annual review, and therefore are not familiar with the process
* Heavy users of smart phones and tablets – most read their emails via these devices
* Very tech and product savvy
* Are exposed to a huge amount of messages every day through a variety of channels – any message needs to cut through a lot of noise. They don’t like to be sold to, but want value – want to know how a product/service will benefit them and their situation
* Relatively informal and relaxed compared to baby boomers
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| **Communication Channel/s** | Email  |
| **Objectives** | * Achieve an open rate of 30% 72 hours after the email has been sent
* Achieve a CTR of 10% 72 hours after the email has been sent
* Complete annual reviews for at least 85% of existing Gen Y clients by 28 February 2017
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| **Call to action** | Contact us to make an appointment for your annual review today |
| **Tone of voice** | * Friendly
* Approachable
* Direct
* Helpful
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| **The problem/challenge** | Currently only about 60% of our existing Gen Y clients complete an annual review. This is due mainly to their inexperience with the financial advice process and being relatively new to insurance  |
| **The opportunity** | Increasing the number of existing Gen Y clients who complete their annual review will allow us to provide them with better service and increase our Gen Y client retention rates.  |
| **The product/service** | We will work with you on a one-on-one basis to determine the success of your current portfolio over the last 12 months, any changes in your current situation, what you hope to achieve in the upcoming year, and provide advice tailored to your specific needs. Unlike our competitors we this can be done in our office, we can come to you, or via Skype.  |
| **The facts/stats/virtues** | * Currently only 60% of our existing Gen Y clients complete an annual review
* Our service is unique in that we set up a one-to-one meeting where and when that is convenient to our client. It may be in our office, at our client’s home, at a café or over Skype
* This one-to-one meeting lasts 1.5 hours and is part of our ongoing annual fee which depends on the amount of the Adviser’s portfolio
* Making sure we are clear, transparent and easy to understand we will go through your current portfolio and detail how successful you have been compared to your original goals over the last 12 months – we do this speaking your language. We explain why something has or hasn’t been successful
* We then discuss and determine you current situation and financial goals for the next year
* We then go back and look at what may need to be changed in your portfolio to suit your needs and situation for the next 12 months, and also to ensure better performance for any underperforming issues
* We send you a full report and recommendations within 5 working days of our meeting, and will then work with you to choose and implement any changes
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| **The key proposition/insight** | Financial portfolios that are reviewed annually can outperform those that are not by up to 30%. ABC Financial Advisers personalised and convenient annual review will help you reach your financial goals.  |