



CHUBB®

Email Marketing
for Financial Advisers

Why you need an
email newsletter
- and how to set
one up

About this guide

Chubb Life wants to support you to become more proficient with digital marketing. In today's world, managing your online presence is essential part of building and maintaining a sustainable client base and profitable business.

This guide designed to help you develop an online presence that aligns to your business and supports your marketing activity. Please use your own discretion when applying the general advice we've provided in this document.

What we cover

In this guide, you'll learn about:

- [Why you need a newsletter](#)
- [3 things to think about before you set up your email newsletter](#)
- [The anatomy of a great newsletter](#)
- [Email marketing dos and donts](#)

Why you need a newsletter as a financial adviser

Wondering how to grow your adviser business and gain the confidence and trust of your clients? An email newsletter might just be the tool you need. Setting up a structure for regular email communications with your clients can benefit your business in a number of ways.

EDUCATE YOUR CLIENTS

In most instances, your clients are looking for answers about financial products. An email newsletter is a great opportunity to educate your clients about trends and industry changes that may affect them while positioning you as the expert.

BUILD TRUST

Your clients will appreciate receiving regular communication especially when markets are volatile and changing regularly. In times of uncertainty, an informative email from you could be the reassurance they need or a timely reminder to update important information.

STAY TOP OF MIND FOR CLIENTS

Not only will regular emails from you help to keep you top of mind, emails also offer a chance to reach your clients or prospects, who may not see your marketing activity across your other channels like Facebook or LinkedIn.

BECOME A THOUGHT LEADER RATHER THAN ANOTHER PASSIVE VOICE

A quality email filled with helpful advice and unique insights can help build your authority among peers and the wider IFA community.

MAKES IT EASY FOR YOUR CLIENTS TO GET IN TOUCH

How often do you hear that a client has been meaning to get in touch, but it keeps slipping their mind? When a client or prospect gets your email newsletter they can simply hit reply, or better yet, forward on if someone asks them for financial help, potentially attracting more clients.

ADDITIONAL BENEFIT - TIME SAVER!

Marketing your Adviser business across a number of social media channels can be time- consuming. Make your marketing efforts

go further by incorporating content from your other marketing channels into your email newsletter. Written a blog post or think piece lately? Add a paragraph to your newsletter. Ran a survey on social media? Share the results and tips via email. Going above and beyond to offer value for your clients is a great way to grow your business and put you ahead of your competition.

3 things to think about before you set up your email newsletter

Before you begin, there are a few things to nail down before you hit 'compose'.

1. WHO WILL READ YOUR NEWSLETTER

Think about who your emails will go to and what types of news or products will interest them. Your emails will likely go to your clients, but they may also go to prospective clients too.

WRITE FOR YOUR AUDIENCE

It may be beneficial to segment your clients into different mailing lists based on their age and stage, or their financial product needs. This way, you can create more bespoke newsletters for each audience and improve the chances that your clients will open and read your newsletter. Audience segments could look like families, business owners, insurance customers or mortgage customers.

MAKE IT EASY TO UPDATE PREFERENCES

Know that not everyone will want to receive regular email newsletters from you. It's not personal! It is, however, a legal requirement to include an unsubscribe button in your email, and it needs to be in a clear and conspicuous place. Make it easy for people to opt-out or change their preferences without needing to block your email address as you may need to get in touch with them about their financial products.

2. WHEN WILL YOU SEND YOUR NEWSLETTER?

It's worth thinking about the **frequency** and **time of day** you should aim to send a newsletter.

WEEKLY, FORTNIGHTLY OR MONTHLY?

Ideally, you would aim to send a newsletter to your mailing list at least once a month. If you've got a lot of content or things to share,

you could test sending shorter emails fortnightly.

When it comes to email marketing, consistency is key. Whatever cadence you decide is fine, as long as you can commit to sending emails at a consistent frequency. You may end up confusing or annoying your recipients if you're sending them sporadically.

WHAT'S THE BEST TIME OF DAY TO SEND YOUR EMAIL?

Time of day isn't super important, but it may be worth playing around with the time you schedule your emails to send. Studies indicate the [best time for sending emails](#) is in the morning, approximately 10 am on Tuesday, Wednesday and Thursdays. Luckily, you won't have to be hovering over the send button as most email marketing tools will have an option to schedule emails to send.

WHAT WILL YOU INCLUDE IN YOUR EMAIL NEWSLETTER?

Now that you've nailed down when and where you're sending your newsletter, it's time to cover what you'll be sending. Content is the star of the show, so say what you need to say in a friendly, human way. Make your message digestible, so recipients quickly understand what you're offering them.

While it may be tempting to pack tonnes of interesting topics into your emails, we recommend sticking to one main message.

To set yourself up for email success, we recommend creating a bank of content ideas and topics to populate your email marketing calendar for the first few months.

Here are a few ideas to get you started:

- Share industry updates
- Share a positive client story or testimonial about your service
- Answer a commonly asked question
- Share your take on timely content (current events)
- Statistics or infographics
- Invitations to events/webinars
- Share a blog post
- Share a comparison sheet of products or services



The anatomy of a great email



SUBJECT LINE

Hook your reader with a catchy subject line. You can use up to 121 characters but try to keep it short and sweet if you can! Aim for approximately 9 words and 60 characters.

PREVIEW TEXT

Give your recipient a reason to open and provide more context on what will be inside.

IMAGES

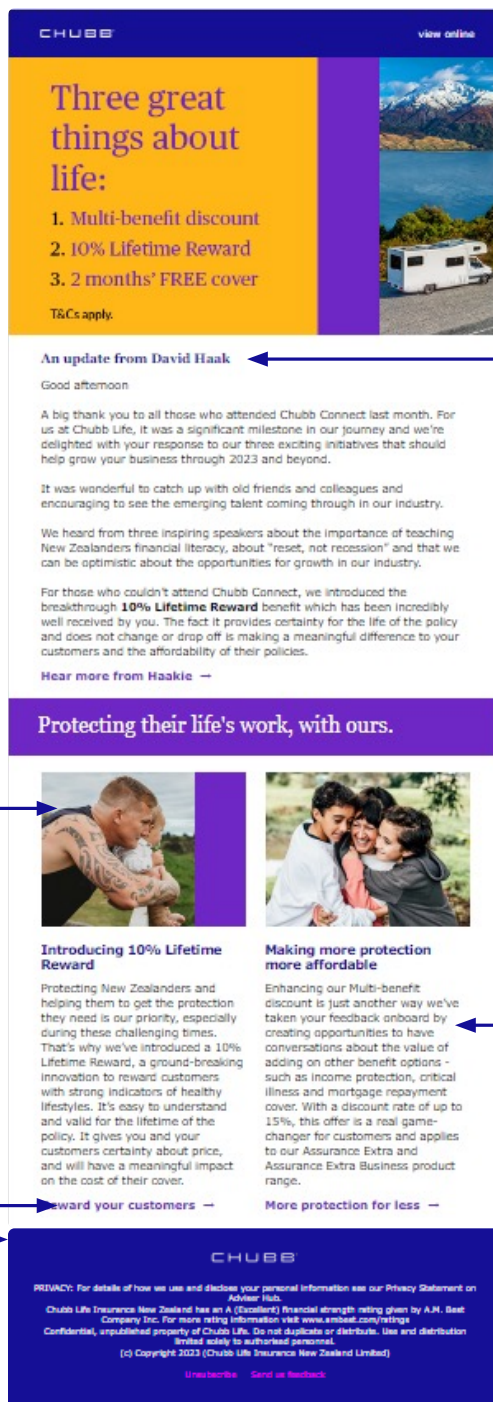
Break up chunks of text with contextual images. Ensure images are resized to your email provider specifications. Images that are too big may slow load times and make your email hard to send or read.

CALL TO ACTION

Ensure your email has a clear call to action. It might be to read the full guide online, get in touch with you about the topic of the email, or forward to a friend. Make it look like a button or clickable text.

FOOTER

Links to your blog or website where people can find more information. Make sure it's easy to unsubscribe/update preferences.



LOGO, BANNER OR BRAND

Your email newsletter should immediately let the reader know what they're looking at.

HEADINGS

Clearly communicate your intended ideas and concepts in your headings. Readers are often time-poor and tend to skim read first. Headers help keep your reader moving or locate the content that's most interesting to them. Use H1, H2 & H3 Headers to show prioritisation.

BODY COPY

The flow of your email is important! To help readers digest the content, aim to: Break text into bite-size chunks. Keep it short and sharp – aim for 500-1000 words. Use Headings, text blocks, bullet points. Break up text blocks and topics with images and line breaks. Make sure your email flows well.

Setting it up

SELECT AN EMAIL NEWSLETTER PROVIDER

Mailchimp is a user-friendly email marketing tool that's free up to 12,000 email sends per month. Try to select an email marketing tool that has lots of templates to make designing and writing your emails a breeze.

There are [plenty on the market](#) that you may want to consider, or your website provider may have an email marketing capacity built in.

PICK A TEMPLATE

You want your emails to be opened and immediately recognisable that it's from you. Pick a template that you think you will be able to stick with so recipients will know what to expect. It's a good idea to include a personal intro section or a header that includes your name or logo.

POPULATE YOUR CONTENT

Enter your compelling subject line, intro, headings and body copy into the template. Add in relevant links, buttons, page breaks and contextual images until you're happy with the look and flow of your email.

SEND A TEST EMAIL

It's a good idea to test and triple check before you schedule your email to send. Make sure to check all the links work and that your email is free from spelling mistakes and grammatical errors. Try to view your email on a mobile and desktop screen to ensure it reads well and the text blocks aren't too long.

SCHEDULE YOUR EMAIL TO SEND

Choose the time of day and day of the week to send your email and schedule your email to be sent.

SHARE THE URL FOR YOUR EMAIL ON SOCIAL MEDIA AFTER IT'S BEEN SENT

Be sure to share your email link on social media a day or two after your email has been sent. This gives your social media followers and prospective clients a chance to preview your newsletter and sign up to receive future emails from you.

KEEP AN EYE ON YOUR EMAIL MARKETING REPORTS

Dive into the back end of your email marketing tool to check out your send report a week or so after you've mailed your readers. Look for a tab that says 'campaign report' or something similar. Looking at your campaign report will give you valuable insight into what recipients are finding interesting, as well as an indication of how well your subject lines and links within your email are performing. Use insights to inform content for future emails.

Email marketing dos and don'ts

DO:

- Respect people's privacy. Ensure that people know that they are opting into receiving marketing emails from you.
- Make it easy for people to unsubscribe or update settings.
- Resize images to best practice size (1200-800px wide) as images that are too big may slow load time.
- Put an email opt-in on your website so prospects can sign up.
- Stick to what you know. Write about things relevant to your business and financial advice. You can make it personal, but keep it professional.

DON'T:

- Add people to your mailing list without their permission.
- Use your newsletter to inform people about anything personal regarding their policy. That is always best handled in person.
- Make your email too long! Keep it to 1-3 great points or insights instead of cramming too much information into one email that will likely go unread.
- Forget to check for broken links, spelling and grammar before you hit send.
- Bombard your readers – stick with a sending schedule that's regular and manageable without spamming your clients.

Useful links

Stay on the right side of the law when it comes to email marketing. Check out the NZ Marketing Association's [Best Practice Guidelines For Email Marketing](#).

[Mailchimp 101 Resources](#) are a great place to start if you're new to email marketing.