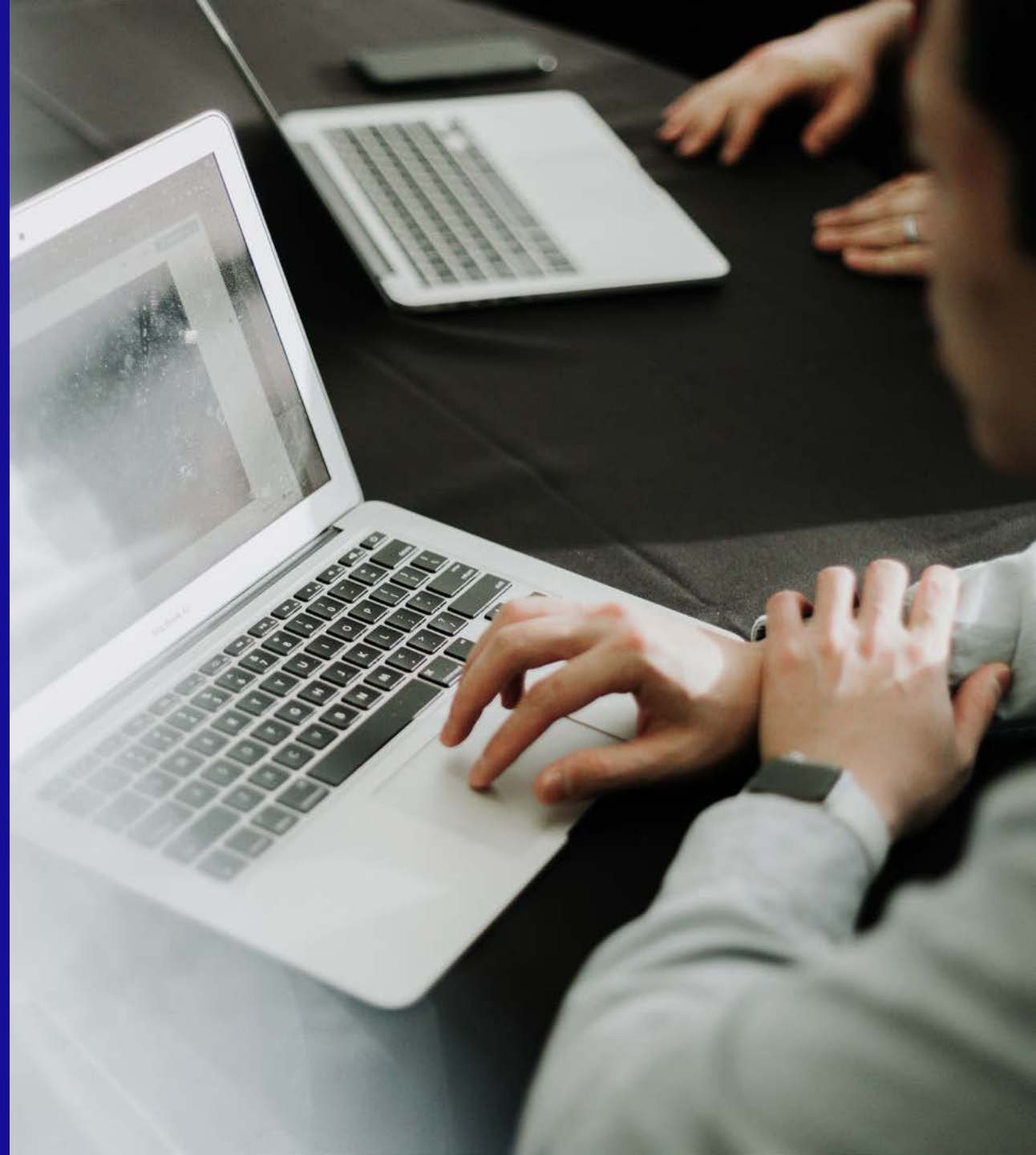


CHUBB®

# Email marketing for Financial Advisers

30 AUGUST 2023



# What we'll cover

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- **Why email marketing is important**
- **What you need to do to prepare**
- **What are some of the email tools you can use**
- **How to build a great newsletter**
- **Tips and tricks**

# Why email marketing is important to your business

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# Building trust and gaining customers' confidence

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Regular email communications with your client can benefit your business in a number of ways

**Educate**

**Build trust**

**Stay top of mind**

**Thought leadership**

**Easy to stay in touch**

**Time efficient**

# Preparing to start email marketing

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# Things to think about before you set up your email

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## 1. Audience

Who's going to read your emails?

## 2. Content – what's going to interest them?

Keep it short and relevant – make sure it's easy to understand. Create a “bank” of ideas. You can stretch these out over a few months.

Here's a few ideas:

- Industry updates
- A positive client story or testimonial
- Answer a frequently-asked question
- Share your take on current affairs or a blog post
- Statistics or infographics
- Product and service comparisons
- Industry events
- Surveys and results



# Things to think about before you set up your email

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## 3. Preferences

Think about how often you want to talk to your customers. Do they want to hear from you weekly, monthly, or when you have news? Being consistent helps build trust.

Make it easy for customers to update preferences by adding an “unsubscribe” button. It’s a legal requirement.

## 4. Time of sending

According to research, the best time to send an email is 10am in the morning during the middle of the week, ie, not on Mondays or Fridays. You can test and measure to see what works best for you and your customers.



# Select a suitable email platform

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# Popular examples

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- Free to use with up to 500 customers
- Drag and drop feature
- Some limitations – for example you don't get send-time optimisations
- You can upgrade features but it's still limited



- Free to use with up to 2000 users
- Can personalise per device type
- Detailed performance analytics
- Send time optimisation



- Prices from \$18 p/m
- Easy to build emails
- Easy to personalise
- Excellent reporting features
- Helpful training

# How to build a great email

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## Subject line and preview text – hook your reader



Fri 18/08/2023 2:21 pm

Chubb Life Masterclass invite <nz.comms@marketing.chubblife.co.nz>  
[EXTERNAL] Join us at Chubb Life's Marketing Masterclass

To Rebecca.Farlow@Chubb.com

## Infographics and stats

The email content features a prominent infographic with a purple and blue color scheme. It displays the statistic '32% of all new applications have included the 10% Lifetime Reward' and 'Business insurance applications have increased by 300% with our new Assurance Extra Business product'. Below this is a section titled 'An update from David Haak' with a small portrait of David Haak. The text discusses market activity and the company's response to customer feedback. At the bottom, there is a section for 'Assurance Extra Business 101 - Occupation classes' with an image of a man in a hat looking at a tablet.

The email content is branded with the Chubb logo and a 'view online' link. It features a yellow and purple header with the title 'Three great things about life:' followed by a list: '1. Multi-benefit discount', '2. 10% Lifetime Reward', and '3. 2 months' FREE cover'. Below this is a section titled 'An update from David Haak' with a 'Good afternoon' greeting and a thank-you message. The text mentions 'three exciting initiatives' and 'three inspiring speakers'. At the bottom, there are two images: one of a man with tattoos and one of a family, with corresponding text: 'Introducing 10% Lifetime Reward' and 'Making more protection more affordable'.

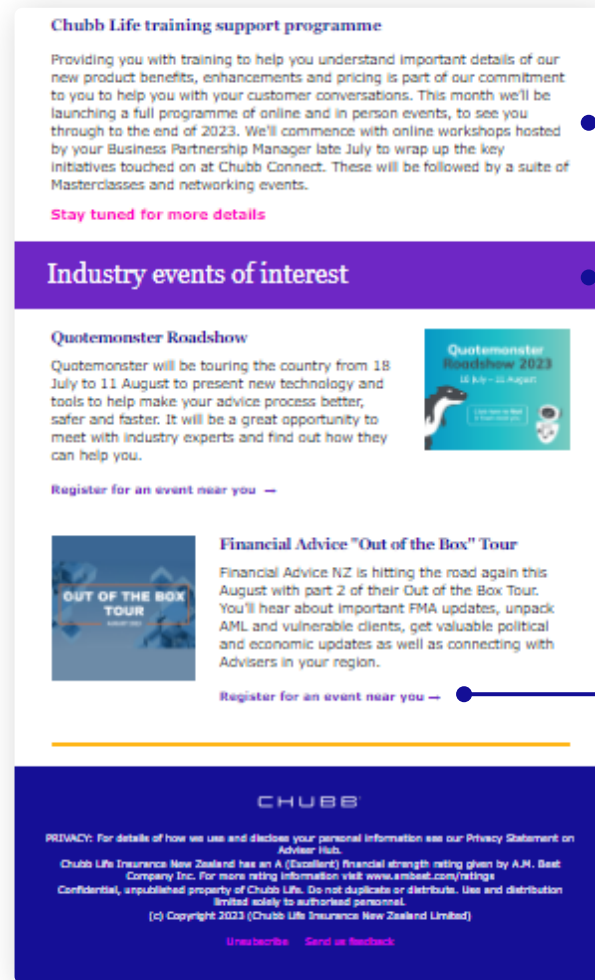
Clearly branded with a logo, brand banner

Introductory hook

Clear headings

Engaging imagery

# What does a good email look like?



Body copy

Clear subject dividers

Call to actions "register now",  
"find out more"

Footer including subscription  
preferences and contact details

# Tips and tricks to building great emails

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## Here's some recommendations on what to do...

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- TEST, TEST and test again
- Schedule your email to send
- Share the URL on social media
- Check your send report to find out what your readers have found interesting – learn from the results
- Respect people's privacy and provide an easy option for them to update their preferences
- Stick to what you know, and only what's relevant to your business and financial advice
- Keep it professional.



## Here's some recommendations on what **NOT** to do....

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- **Don't** add people to your mailing list without their permission
- **Don't** add anything personal about people's policies
- **Don't** make your email too long – 1-3 points is better than too much information that doesn't get read
- **Don't** deviate from your sending schedule.



# Useful links

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NZ Marketing Association's [Email Marketing Best Practice Guidelines](#).

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





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