



Project: **CLARICA'S "GOOD NEWS" DIRECT MAILER**  
Segment: Direct Marketing: Lead Generation

*Program objectives*

- Motivate high-value customers to call agent and make an appointment.
- Increase life insurance sales to targeted customers.

*Significant results reported by user*

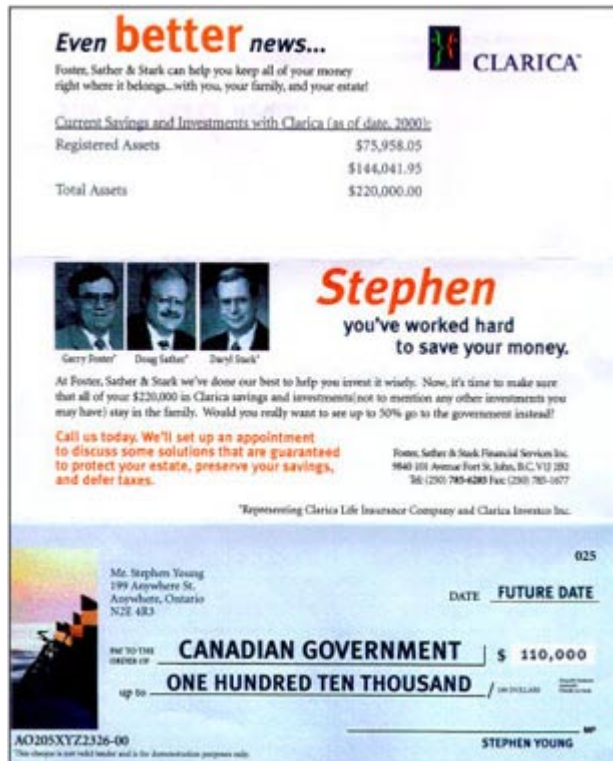
*Summer 2000*

- Average response rate: 9.5% of recipients called.
- 86.7% of responses resulted in appointments.
- Result: for every 1000 pieces mailed, 82 appointments were achieved – an outstanding result.
- 11.5% of the appointments resulted in sales.

*Fall 2002*

- Average response rate increased from 9.5% to 15% (60% more)

Multi-year



<b>Segment</b>	<b>Direct Marketing: Lead Generation</b>
<b>Participants</b>	
<b>Client</b>	Clarica, a brand of the Sun Life Assurance Company of Canada
<b>Program</b>	
<b>Target Audience</b>	Clients who had total registered assets with Clarica greater than \$100,000.
<b>Description</b>	<p>Foster, Sather &amp; Stark of Fort St. John, B.C. is one of Clarica's top producing Multi Advisor Corporations (MAC). With an impressive block of wealth accumulation clients, this particular MAC had excellent potential for up-selling life insurance – especially with clients concerned about keeping their money, property and assets in the family rather than being taxed up to 50% by the government.</p> <p>A compelling message was needed to get these targeted clients to call the MAC and set an appointment to discuss their insurance needs. To capture this audience's attention the "Good News" mailer was created, which merged client data and agent information to provide a message that was personalized for an individual client's needs.</p> <p>The direct mailer detailed a client's current wealth accumulation with Clarica and then took half of those assets and placed it on a realistic looking check made payable to the Canadian government. The mailer urged the client to call Foster, Sather &amp; Stark to avoid signing that check.</p> <p>The direct mailer would only be as good as the quality of its client data. As a result, Clarica householder data was manually checked against the MAC's Client Management System to ensure the client list was clean and accurate and to give the MAC an opportunity to remove any clients that they did not want to send a mailer, such as a client they had just recently met with.</p> <p>To strengthen the relationship between the client and the agent the mailer included additional personalization, such as the agent's name, contact information and photo, to give the sense that the mailer came directly from the agent.</p> <p>In the fall of 2002, the Good News mailer was offered in both English and French to a select group of Clarica advisors with blocks of business that met the mailer's criteria. The average response rate for this production mailing was 15%.</p>
<b>Awards Received</b>	2001 Silver Leaf Award of Excellence from the International Association of Business Communicators (IABC) Canada.

