

Find your way to more income

How a cross-selling marketing campaign could boost your earnings

Think

With the current situation in the mortgage market, businesses are starting to re-think the way they operate and are considering more creative ways to maintain their income.

You are probably already considering this yourself and we would like to help you by offering you the tools you'd need for one of the most effective ways to do this – by cross-selling general insurance to your existing customers. After all, in uncertain times they need reassurance and protection more than ever.

However, it's not always easy to get started, so we've put together a cross-selling toolkit to help you put your thinking into action. It provides you with advice on how to plan and execute a successful email or mailing campaign, along with some useful hints and tips – and is also available online at www.paymentsshield.co.uk/toolkit.

See how much you could boost your income – try our commission calculators in the 'Broker Tools' section of the website.

Plan

STEP 1

Define objectives
Define target audience
Choose the right time
Define campaign elements

STEP 2

Preparing your database
Analysing your data
Select your data
Define Pilot exercise

STEP 3

Draft letter and emails
Source support material
Ensure regulatory compliance

STEP 4

Campaign execution
Measure success and feedback

Do

Day 1
Pilot mail to clients

Day 5
Prepare quote and undertake follow up call

Sale?

Yes

Completion process and capture other key dates or missing data. Gain permission to contact in future.

No

Agree call back date or date for financial review. Capture other key dates and missing data. Gain permission to contact in future.

Day 10
Assess success of pilot and lessons learned

Roll-out