

Nationwide®

**Marketing**

Nationwide Financial® Creative Services



# Concept Review

# Single Sale

# Advisor Program

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# The creative challenge

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Since the beginning of 2012, over 5600 advisors have made their first sale of a Nationwide life or annuity product. Only 3% of these advisors on average will sell additional products through Nationwide. This project aims to create a new “best in class” program to generate more leads with first sale advisors (first sale within the past 5 years) to sell with us 2+ times over a 12-month period.



**Who** are we talking to?

Financial advisors who are appointed with Nationwide but are not in any communication program, such as the Top 200, and don't have a relationship with Nationwide.



**What** do we want them to do?

To become familiar with all that Nationwide has to offer, including product and value add programs, and feel more connected with Nationwide.



**Why** should they do it?

Nationwide's strong value add programs can help them be more effective at their jobs and so they trust that their success is in Nationwide's best interest and that Nationwide is dedicated to helping them build their business.



## BRAND CHARACTER ATTRIBUTES:

**Authentic:** We are sincere, honest and genuine.

**Thoughtful:** We are caring thought leaders. We always consider the expectations and needs of our customers.

**Stable:** We are a strong and stable company that can stand the test of time.

**Expert:** We know our field better than anyone else.

**Empowering:** We help advisors help their clients feel more secure about facing the future.

**Confident:** We are self-assured, but never arrogant.

# A strategic approach

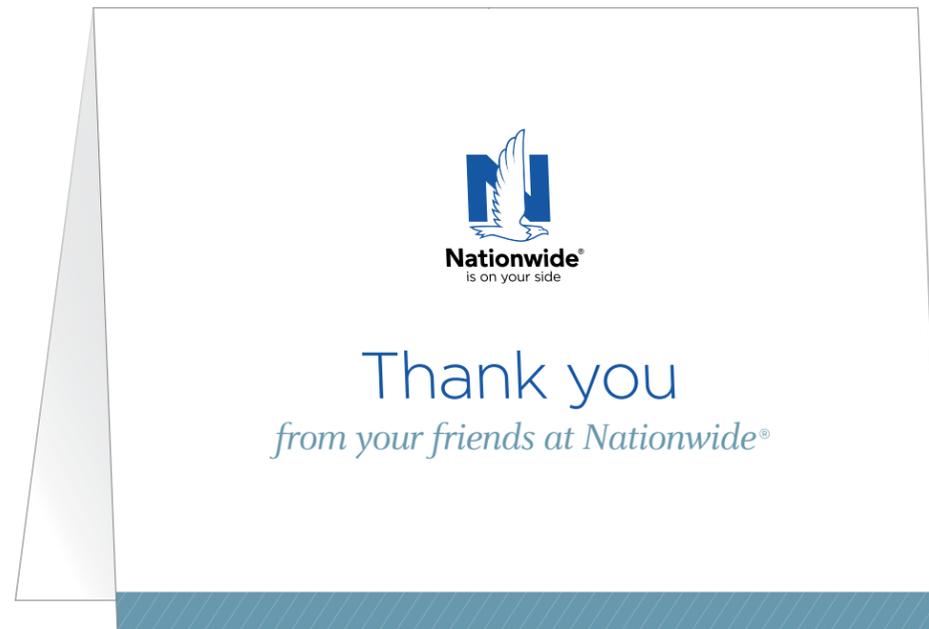
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Nationwide has an aggressive growth goal of \$20 billion by 2020. In addition to other activities in the IPS strategic growth plan involving medium and heavy producers, there's an opportunity to help close the current premium gap by building relationships with these single sale low producers — from both life and annuity — and moving them into the medium category. Our strategy is to leverage the “business-building support” messages and benefits of the Circle program, which will not only allow Nationwide to create a pipeline for moving single sale advisors into the core category but help to build more robust Top 200 and Circle programs.

# Existing material

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## THANK YOU CARD AND PEN



# Program Name Exploration

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- Nationwide Next
- Curve
- Arc
- Launch
- Launch Pad

- Ascend
- Ignite
- Propel
- Domino
- SaleStar

- Drive
- Tempo
- Myriad
- Endeavor

CONCEPT 1:

# Building loyalty: “We’re committed to your success.”

**DEFINITION:** Loyalty is a value that relates to commitment and trustworthiness — values are important to people and serve as a motivating force that drives behavior.

This concept aims to generate brand loyalty in return for Nationwide’s commitment to help the target audience build their business and achieve success.

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“As a stable but dynamic force in the insurance industry, we’re in a position to reward our advisors with what they value most: business-building support. And we’re committed to helping you grow your business too. At Nationwide you’re in the company of professionals who value your vision of success. Please contact me for more details about access to support, resources and education opportunities through the *Nationwide SaleStar program*.”

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Mood Board

CONCEPT 1 : BUILDING LOYALTY

"We're committed to your success."



CONCEPT 1:

# Building loyalty: “We’re committed to your success.”

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Sample messaging:

[Sample headline]

You have a vision of success.  
We’ve got a plan of action  
to help you realize it.

[Sample subhead]

When it comes to growing your business, you can count on our support.

[Sample CTA]

We appreciate the opportunity to do business with you and look forward to our continued relationship — please contact me to discuss the benefits of the **Nationwide SaleStar program** or talk about new ways we can help build your business.

Whatever you and your clients face, let’s face it together.

[Wholesaler name]

[Wholesaler signature]

CONCEPT 2:

# Providing guidance: “You can rely on our expertise and resources.”

**DEFINITION:** Guidance is the process of helping people discover and develop their potential in conjunction with their abilities and expectations.

This concept aims to make the target audience feel secure and confident about doing business with Nationwide because we dedicate our expertise and resources to helping them achieve success.

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“As a company that understands the value of connections, we reward our advisors with what they value most: business-building support. You can rely on our expert guidance and useful resources to help you build trust with your clients and grow your business. Please contact me for more details about access to support, resources and education opportunities through the *Nationwide Endeavor program*.”

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CONCEPT 2:

# Providing guidance: “You can rely on our expertise and resources.”

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Sample messaging:

[Sample headline]

Enjoy greater access to our  
expertise and resources.

[Sample subhead]

We're committed to helping you build on your successes.

[Sample CTA]

We appreciate the opportunity to do business with you and look forward our continued relationship — please contact me to discuss the benefits of the **Nationwide Endeavor program** or talk about new ways we can help build your business.

Whatever you and your clients face, let's face it together.

[Wholesaler name]

[Wholesaler signature]

CONCEPT 3:

# Offering a stepping stone: “Take the next step to success.”

**DEFINITION:** A stepping stone implies a means to an end, an opportunity that can lead to ‘bigger and better’ things.

This concept aims to acknowledge the target audience’s potential for success on the one hand and on the other offer them a way to get there via Nationwide’s support and expertise.

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“As a company that likes to see people succeed, we reward our advisors with what they value most: business-building support. We’d like to help you set your business goals to advance from single-sale status to the inner circles of our loyalty programs, where elite members enjoy premium benefits. Please contact me for more details about access to support, resources and education opportunities through the *Nationwide Next program*.”

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# Mood Board

## CONCEPT 3: OFFERING A STEPPING STONE

"Take the next step to success."



CONCEPT 3:

# Offering a stepping stone: “Take the next step to success.”

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Sample messaging:

[Sample headline]

Success means keeping the momentum going, with exclusive support from Nationwide.

[Sample subhead]

**Next steps:**

**Boost your expertise.**

**Strengthen your relationships.**

**Expand your business.**

[Sample CTA]

We appreciate the opportunity to do business with you and look forward to our continued relationship — please contact me to discuss the benefits of the **Nationwide Next program** or talk about new ways we can help build your business.

Whatever you and your clients face, let's face it together.

[Wholesaler name]

[Wholesaler signature]

# Tactics: Our approach

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While the existing post-sale ‘welcome’ touch point fails to generate more sales, multiple touches over a period of time will provide the type of consistency that creates brand recognition and builds loyalty. Three tactic plans are proposed:

## Tactic Plan #1

### 1. Welcome kit

Inserts:

- Thank-you card
- Survey/response card
- Product overview piece (Denny’s menu?)
- Gift set combo
  - ~ Branded pen
  - ~ Business card holder with contact cards
  - ~ Flash drive loaded with sales ideas, etc.

### 2. Follow-up phone call

### 3. Mailer #2 with book/DVD

### 4. Follow-up phone call

## Tactic Plan #2

### 1. Welcome kit

Inserts:

- Thank-you card
- Survey/response card with offer
- Business card holder loaded with contacts

### 2. Follow-up email/phone call to ‘connect’

### 3. Mailer #2 for those who return response card or call

- Sales ideas loaded on a branded flash drive (spring-loaded “key” mailer)
- Product overview piece
- CTA to order product literature

### 4. Follow-up email/phone call

### 5. Mailer #3 for those who call or order materials

- Desktop pen holder with pens to give to clients

## Tactic Plan #3

### 1. Welcome kit

Inserts:

- Thank-you card
- Survey/BRC
- Web key to Evernote Business [NW resource and meeting hub]
- Free Evernote app download

### 2. Follow-up phone call

### 3. Email with code to unlock more notebooks on Evernote (or invitation to a presentation on Evernote)

### 4. Mailer #2

- Evernote Snapcase for capturing contacts into Evernote

# Tactics: visuals

**GIFT SET COMBO**



**MAILER WITH BOOK/DVD**



**WEB KEY**



**CREDIT CARD SIZED USB FLASH DRIVE**



**BUSINESS CARD HOLDER LOADED WITH CONTACTS**



**DESKTOP PEN HOLDER**



**EVERNOTE SNAP CASE**



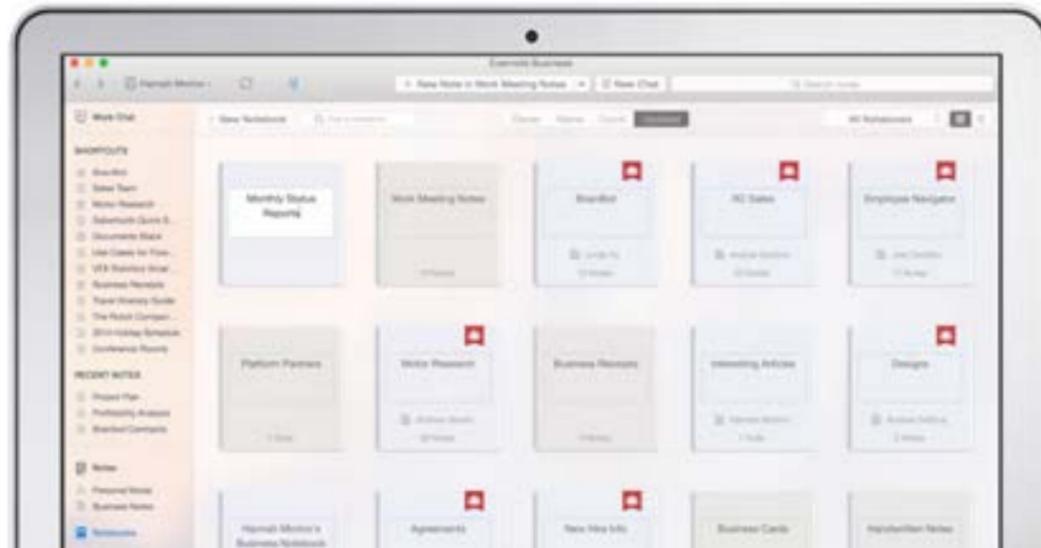
# Evernote Business

## Where great ideas converge

Evernote Business is your company's workspace. Write, research, and collaborate in one app that encourages the speed and trust to make any team feel small again.

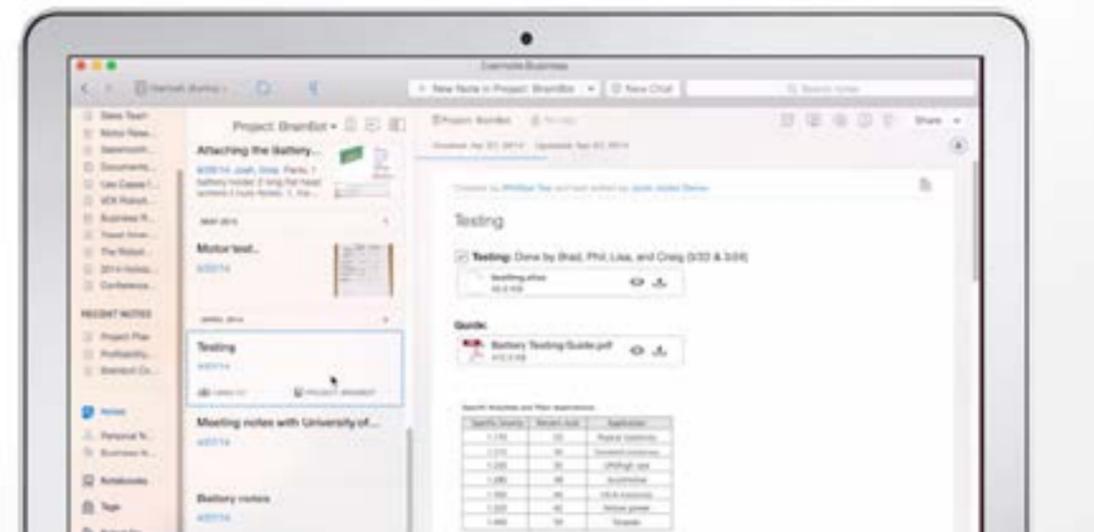
### ONE WORKSPACE

Create a collaborative hub for your team to brainstorm, develop, and launch projects with business notebooks.



### THE TEAM GROWS SMARTER

Seamlessly share knowledge and resources across the entire company in the business home.



# Evernote Business



## SECURITY FEATURES

Your data is protected by industry-standard TLS/SSL encryption and two-step verification.



## DATA OWNERSHIP

No matter how the team changes, your company stays in control of the data in business notebooks.



## BUSINESS CLASS SUPPORT

Accelerate your business' adoption and maximize ROI with help from our Customer Success team.

