



CREATING A WINNING AWARDS SUBMISSION

WESLEYAN

we are all about you

2017 AWARDS

Integrated Campaign



Sponsored by

**SAPIENT
RAZORFISH**

Winner

Wesleyan: Educating Teachers About Retirement Planning

Wesleyan has around 60 financial consultants specialising in teachers' finances (including the Teachers Pension Scheme). To access this market, they have historically provided free to attend pre-retirement seminars in conjunction with the teachers' union NASUWT. Following seminars, delegates are invited to book an appointment with a Wesleyan Financial Consultant.

Wesleyan identified that unprompted brand awareness amongst their target audience was low, so designed a multi-channel campaign to raise the profile of their seminar programme and the benefits of attending. Their strategy increased awareness and registrations, broadening their target age range, identified opportunities to improve internal systems, and nurtured leads with insight-driven content. Based on traditional conversion rates, they clearly showed how the increased campaign appointments will mature to sale and provide a ROI over 650%.



WESLEYAN

we are all about you

2017 AWARDS



WESLEYAN

we are all about you

1. WHAT IS THE ISSUE OR CHALLENGE FACING THE BUSINESS?

Our strategy addressed three main challenges:

- ▶ Increase seminar registrations
- ▶ Increase appointment requests
- ▶ Improve internal processes

These three metrics were referenced throughout the award submission

2. WHAT WAS THE INSIGHT THAT UNDERPINNED YOUR STRATEGY?

Seminar registrations

- ▶ Customer research (retirement planning behaviour & go-to sources of information)

Appointment requests

- ▶ Customer research (information needs & knowledge gaps)

Internal process improvement

- ▶ Process mapping (understand & enhance the customer journey)

3. WHAT WAS YOUR PROPOSED STRATEGY TO ADDRESS THE ISSUE OR CHALLENGE?

Seminar registrations

- ▶ Multi-channel marketing campaign to raise awareness of proposition
- ▶ Targeting based on research findings

Appointment requests

- ▶ Nurture leads with insight driven content
- ▶ Increase the number of channels via which appointments could be arranged

Process improvement

- ▶ Introduced measures to improve appointment booking processes

4. HOW DID YOU EXECUTE THE STRATEGY?

a. Data mapping

- ▶ Targeted prospects by drive time and personalised invitations according to location

b. Campaign activity

- ▶ Demonstrated multi-channel approach
- ▶ Correlation between activities and seminar registrations

c. Appointment bookings

- ▶ Outlined process improvements

5. WHAT METRICS DID YOU PUT IN PLACE TO TRACK THE EFFECTIVENESS OF YOUR SOLUTION?

Pre campaign metrics

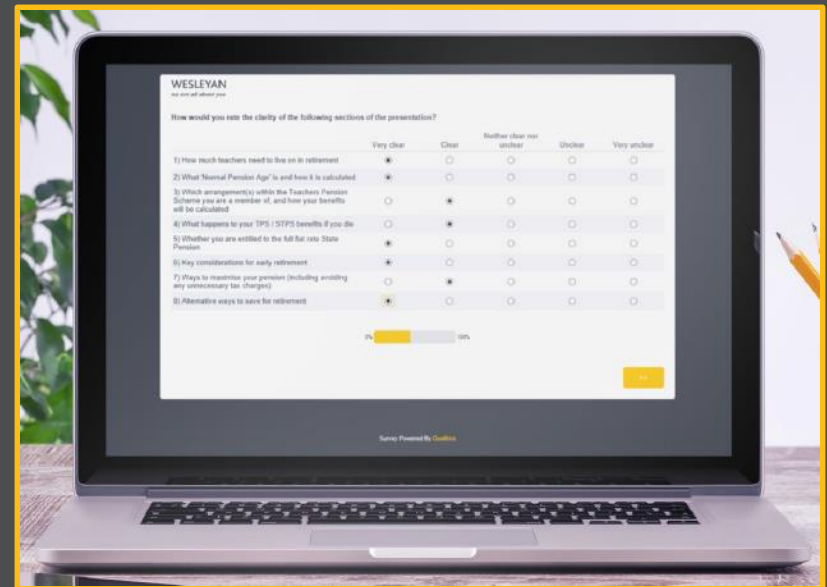
- ▶ Research – response rates and engagement

Campaign metrics

- ▶ Seminar registrations
- ▶ Email open and click through rates
- ▶ Phone call volumes
- ▶ Appointment booking volumes
- ▶ Google / Social Media analytics
- ▶ Sentiment analysis
- ▶ ROI - sales and income

Post campaign metrics

- ▶ Satisfaction survey - response rates and engagement (95% positive)
- ▶ Customer testimonials



6. HOW CAN YOU PROVE THAT YOUR CAMPAIGN STRATEGY MET ITS OBJECTIVES?



- ▶ Client testimonials
- ▶ Year on year comparisons
 - ▶ Registrations
 - ▶ Attendance
 - ▶ Leads
 - ▶ Appointments
 - ▶ Sales
 - ▶ ROI

7. WHAT VALUE WAS ADDED TO YOUR BUSINESS AS A RESULT OF YOUR STRATEGY?

- ▶ Working relationship with strategic partners strengthened
- ▶ Customer advocacy
- ▶ In-house skill development
- ▶ Methodologies transferable to other target segments
- ▶ Improved internal processes
- ▶ Increased social media following

THE JUDGING CRITERIA

| Question | Degree of compliance | Weighting |
|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| Q1. What was the issue or challenge facing the business? | Problem/challenge virtually unarticulated | |
| | Problem/challenge articulated but not clearly, perhaps weak/ambiguous definition of terms, no quantification | |
| | Problem/challenge poorly articulated but quantified | |
| | Problem/challenge well articulated qualitatively, not quantified | |
| | Problem/challenge well articulated, well quantified | 50 Marks |
| Q2. What was the insight that underpinned your strategy and tactics? | No explanation | |
| | Explanation superficial, generalised, possibly no/poor definition of terms, not logically connected, not quantified | |
| | Explanation superficial but with good definition of terms, not logically connected, not quantified | |
| | Explanation good, with good definition of terms, logically connected but not fully quantified | |
| | Good explanation, definition of terms, logically connected and fully quantified | 50 Marks |
| Q3. What was your proposed strategy to address the issue or challenge? | No strategy articulated | |
| | Basic strategy described but no clear connection with executions or consideration of options for achieving strategy | |
| | Good, detailed articulation of strategy but no clear connection with executions, or consideration of options for achieving strategy or choice mechanism | |
| | Good detailed articulation of strategy & connection with executions, but no consideration of options for achieving strategy or choice mechanism | |
| | Good detailed articulation of strategy & connection with executions, well described consideration of options for achieving strategy & choice mechanism | 25 Marks |
| Q4. How did you execute the strategy? | Solution weak, unclear/ambiguous/inconsistent terms, not logically connected, not comprehensive, nor with clarity about implementation | |
| | Solution well but only partially/fragmented, not logically connected or with clarity about implementation | |
| | Solution comprehensive, but not logically connected or with clarity about implementation | |
| | Solution comprehensive & logically connected but no clarity about implementation | |
| | Solution comprehensive, logically connected, implementation clear | 50 Marks |
| Q5. What metrics did you put in place to track the effectiveness of your solution? | No description of controls | |
| | Superficial description of controls, weak definition of effectiveness, control description not really focused on effectiveness | |
| | Good description of controls & definition of effectiveness, but control description not focused on effectiveness | |
| | Good description of controls & definition of effectiveness, but control description only weakly focused on effectiveness | |
| | Good description of controls and definition of effectiveness, control description fully focused on effectiveness | 25 Marks |
| Q6. How can you prove that your campaign strategy met its objectives? | No data provided | |
| | Data provided but not clearly linked to effectiveness | |
| | Some data related to only some effectiveness measures presented | |
| | All data related to only some effectiveness measures presented | |
| | All data related to all effectiveness measures presented | 100 Marks |
| Q7. What value was added to your business as a result of your strategy? | No definition of value added to business | |
| | Poor definition of value to business, no or weak identification of value added or quantification | |
| | Good, possibly partial definition of value to business, no or weak identification of value added or quantification | |
| | Good, complete definition of value to business, weak identification of value added or quantification; or good partial definition of value to business, good identification of value added or quantification | |
| | Good, complete definition of value to business, good quantification of value added | 100 Marks |
| | Total | 400 Marks |

Advice is provided by Wesleyan Financial Services Ltd.

'WESLEYAN' is a trading name of the Wesleyan Group of companies.

Wesleyan Financial Services Ltd (Registered in England and Wales No. 1651212) is authorised and regulated by the Financial Conduct Authority. Wesleyan Bank Ltd (Registered in England and Wales No. 2839202) is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register No.165116). Wesleyan Financial Services Ltd and Wesleyan Bank Ltd are wholly owned by Wesleyan Assurance Society which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Incorporated in England and Wales by Private Act of Parliament (No. ZC145). Registered Office for all of the above Group companies is: Colmore Circus, Birmingham B4 6AR. Telephone calls may be recorded for monitoring and training purposes.

Wesleyan Financial Services Ltd will offer you restricted advice on a limited number of products provided either by one provider or a limited number of providers. For residential mortgages, we offer a comprehensive range from across the market but do not offer deals which you can only get by going direct to a lender. For commercial mortgages, we will introduce you to Lloyds Bank. Wesleyan Bank provides personal and commercial lending. Wesleyan Financial Services Ltd is acting as a credit broker and not a lender.

The Financial Conduct Authority does not regulate commercial mortgages and Inheritance Tax Planning. The information in this presentation is based upon our current understanding of taxation and legislation which may change in the future.

WESLEYAN

we are all about you