

## **PROPOSAL**

# **Introducing the New York Life Agency Portal: A Multimedia Communications Campaign for New York Life**

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# OVERVIEW

## Project Description and Purpose

New York Life has developed a web-based suite of software applications, centered on a new *Agency Portal*, to enable Agents and brokers to expand their business. The Company plans to deploy the software this summer as part of an initiative to improve productivity, cut costs and drive revenue growth by moving business online. The Company will begin a test of the software in six locations in July. Later this summer, it will launch the New York Life *Agency Portal* in Dallas and then roll out the software at 120 offices around the country.

A web-based system for generating leads, writing business, and conducting numerous tasks online has the potential to accomplish many goals. Among its many benefits, the *Agency Portal* will:

- Strengthen and support the ability of New York Life to rapidly implement new revenue and sales initiatives
- Cut costs of Agency transactions
- Strengthen ties with the Agency community
- Promote data security; and
- Provide a platform for future growth

The communications campaign to launch and promote usage of the *Agency Portal* will be a comprehensive program that encourages usage of the portal, educates users about portal features and moves Agents from older paper or pc-based record systems to the new state-of-the art, portal interface.

The campaign will be designed to:

- Promote acceptance and use of the *Agency Portal* as the primary channel for Agency communications and transactions with New York Life
- Drive increased sales
- Promote data security
- Move the agency community onto broadband connections
- Promote allegiance with New York Life
- Demonstrate New York Life's leadership in e-insurance
- Create a channel for instant, simultaneous software upgrades and communications

# OVERVIEW

## Program Objectives

The campaign to launch and promote the Agency Portal has the following objectives:

- Increase awareness and enthusiasm about the launch of the Agency Portal
- Build understanding of the different capabilities the Agency Portal offers
- Inform agents/assistants of the features and benefits of the Agency Portal
- Create a festive environment that embraces the idea of one stop client administration and emphasizes the Portal' ability to ease the administrative burden
- Foster belief and commitment to the needs of the agents required to make client administration and selling NY Life products a success
- Educate and help agents/assistants feel comfortable about placing sensitive information on the web and excited about the benefits of doing so
- Excite Agents about the products and services New York Life offers their clients
- Increase market share through new services such as lead generation and web-based contact management
- Reduce costs of administration by driving communications with agents on-line.
- Drive Agents currently using paper-based or standalone systems to a web-based interface

### **Longer term objectives include:**

- Promote uploading of contacts to a secure online environment
- Reinforce a culture change from a paper-based to web-based mindset
- Promote customer data security by moving data off unprotected computers to a professionally managed, secure on-line data center

# OVERVIEW

## Target Audiences

*Primary audiences:* 2000 agents attending Dallas convention drawn from  
6000 agents working in 120 general offices and  
6000 agents working in individual offices  
Assistants to top producing agents

*Secondary audiences:* 465 managers  
180 trainers  
New York Life organization

## Project Team

Strategic will provide New York Life with a dedicated team of project directors and project managers. This team will work with a designated team from New York Life to design and develop the program, create all program deliverables, train managers and employees on the program and provide ongoing support once the program launches.

We recommend that the Strategic team work in tandem with a recommended team of managers and employees from New York Life to develop and fine tune the program parameters.

## IMPACT BY AUDIENCE

In addition to the program's expected impact on profitability, implementation of the envisioned *Agency Portal* will have other positive benefits for Agents, managers, trainers and the New York Life organization. These include the following:

### Agents

- Reduce the administrative burden associated with managing and expanding accounts
- Expand business with New York Life, increasing annual income
- Simplify contact management and improve client relations
- Educate agents in new sales techniques, work-saving administrative techniques and new best practices in client administration
- Create a communications channel to improve communications between New York Life and agents

### Managers

- Give managers a selling tool to recruit new agents
- Facilitate communications between managers and agents
- Improve transparency in tracking Agent performance

### Trainers

- Provide trainers with tools and materials to assist in training users
- Excite Agents about the benefit or training in the new Agency Portal
- Pre-educate Agents about important features of the Agency Portal

### Organization

- Increased Agency loyalty
- Reduced Agent turnover
- Improved visibility into Agency Performance
- Improved communications channel with Agents
- Strengthened relationship with the Agent community

## COMMUNICATIONS AT-A-GLANCE—Pre-Event

Tactic	Description/Objective	Audience	Timing
<b>Program Identity</b>	<ul style="list-style-type: none"> <li>▪ Develop a concept and design for the event that will be immediately identified and mirrors corporate values                             <ul style="list-style-type: none"> <li>• Three concepts developed</li> <li>• One concept finalized</li> </ul> </li> </ul>	Agents	Finalized by June 25 <sup>th</sup>
<b>Coming Soon Teaser Postcard</b>	<ul style="list-style-type: none"> <li>▪ Mailed to agents at the office                             <ul style="list-style-type: none"> <li>▪ Coming soon postcard to notify agents of upcoming launch event – both Regional and Local</li> </ul> </li> </ul>	All agents and assistants	Early July
<b>Benvelope</b>	<ul style="list-style-type: none"> <li>▪ Beveled envelope sent to each agent                             <ul style="list-style-type: none"> <li>▪ Letter from senior team on letterhead</li> <li>▪ Post It Pads –</li> <li>▪ Pen (reflecting theme)</li> <li>▪ At a Glance Tip Sheet on AP</li> <li>▪ Scratch off Ticket – Instant Winner using Part 1 of hidden message</li> <li>▪ Other Informational Materials</li> <li>▪ Launch event detail sheet – explains about each launch, how to win more prizes, future mailings</li> <li>▪ “Owner’s Manual” – a comprehensive guide to using the portal in leatherette binder</li> <li>▪ Survey regarding goals for Agency Portal use – can be mailed or log in to website to do online survey with serial number listed on survey –points awarded for completion</li> </ul> </li> </ul>	Agents	Mid July
<b>Email</b>	<ul style="list-style-type: none"> <li>▪ Mass email sent to all agents</li> <li>▪ Eprize for logging on – redeemed at launch</li> <li>▪ Eprize for answering quizzes correctly – redeemed at launch</li> </ul>	Agents	Early July
<b>Publication Articles</b>	<ul style="list-style-type: none"> <li>▪ SCG to draft articles regarding the upcoming launches</li> </ul>	Agents	Early July
<b>Did you forget? Postcard</b>	<ul style="list-style-type: none"> <li>▪ Reminder postcard to look for more information about the upcoming launch event</li> </ul>	Agents	Mid July
<b>Teaser Poster</b>	<ul style="list-style-type: none"> <li>▪ 30 x 40 poster announcing launch at meeting</li> </ul>	All sites	Late July
<b>Invitation</b>	<ul style="list-style-type: none"> <li>▪ REGIONAL                             <ul style="list-style-type: none"> <li>▪ Each Agent receives an invitation for the event taking place at their regional office</li> </ul> </li> <li>▪ LOCAL                             <ul style="list-style-type: none"> <li>▪ Each site receives themed, blank invitations that can be personalized for the Agents at their sites, along with the specific date and location for their site events</li> </ul> </li> </ul>	All sites	Late July
<b>Announcement Poster</b>	<ul style="list-style-type: none"> <li>▪ 11 x 17 poster announcing details of launch (date, time and location)</li> </ul>	All sites	Prior to launch event at sites

## COMMUNICATIONS AT-A-GLANCE—Event One

### DALLAS, TEXAS

Tactic	Description/Objective	Audience	Timing
<b>Agenda</b>	Develop launch agenda to reflect concept	Agents	Early June
<b>Invitation / Raffle Form</b>	<ul style="list-style-type: none"> <li>▪ Special invitation to all agents attending Dallas Meeting</li> <li>▪ Each participant completes the entry form for a raffle prize drawing at the event</li> <li>▪ Small gift reflecting theme goes along with invitation</li> </ul>	2000 agents	Early July
<b>Announcement Poster</b>	Posters to be hung at the Dallas site with date, time and location	Agents	Early August
<b>Tents /Meeting Space</b>	<ul style="list-style-type: none"> <li>▪ Set up outside on site or space reserved for meeting</li> <li>▪ Decorated to reflect theme</li> <li>▪ Music, balloons, refreshments and snacks</li> </ul>	Agents	Day before launch event
<b>Introduction Video</b>	Develop and produce introduction video with message from Chairman <ul style="list-style-type: none"> <li>▪ Concept</li> <li>▪ Scripting</li> <li>▪ Editing</li> <li>▪ Production</li> </ul>	Agents	Early August
<b>Slides</b>	Work with speakers to define and develop slides for launch <ul style="list-style-type: none"> <li>▪ Editing</li> <li>▪ Rehearsals</li> </ul>	Agents	Mid August
<b>Speaker Handouts</b>	Work with speakers to define and develop appropriate handouts <ul style="list-style-type: none"> <li>▪ Slide copies</li> <li>▪ Other materials</li> </ul>	Agents	Mid August
<b>Premiums</b>	<ul style="list-style-type: none"> <li>▪ Develop participant gifts that reflect concept and theme:               <ul style="list-style-type: none"> <li>▪ Take away gift distributed at the end of the meeting</li> </ul> </li> </ul>	Agents	Ordered by Mid July
<b>Games</b>	<ul style="list-style-type: none"> <li>▪ Instant games can be played where prizes are won on the spot for answering questions on the website</li> <li>▪ Prizes may be points or items</li> </ul>	Agents	Ordered by Mid July
<b>Survey</b>	<ul style="list-style-type: none"> <li>▪ Surveys to be completed at game tables as part of a Q &amp; A on the website benefits</li> </ul>	Agents	Early August
<b>Raffle Drums/Prizes</b>	<ul style="list-style-type: none"> <li>▪ Completed raffle entry forms put into raffle drum for a grand prize drawing</li> </ul>	Agents	Early August
<b>Kiosk for Prize Redemption</b>	<ul style="list-style-type: none"> <li>▪ Kiosk set up to show a catalog of prizes for the winners of instant prize points to redeem from – or to view their point banks.</li> </ul>	Agents	



## COMMUNICATIONS AT-A-GLANCE—Event Two

### Regional offices – NY, GA, CA, TX

<b>Tactic</b>	<b>Description/Objective</b>	<b>Audience</b>	<b>Timing</b>
<b>Agenda</b>	Develop launch agenda to reflect concept	Agents	
<b>Invitation / Raffle Form</b>	<ul style="list-style-type: none"> <li>▪ Special invitation to all agents for their specific Regional office meeting</li> <li>▪ Each participant completes the entry form for a raffle prize drawing at the event</li> <li>▪ Small gift reflecting theme goes along with invitation</li> </ul>	Agents	
<b>Poster</b>	Posters to be hung at each of the sites with date, time and location	Agents	
<b>Tents /Meeting Space</b>	<ul style="list-style-type: none"> <li>▪ Set up outside on site or space reserved for meeting</li> <li>▪ Decorated to reflect theme</li> <li>▪ Music, balloons, refreshments and snacks</li> </ul>	Agents	
<b>Introduction Video</b>	Develop and produce introduction video with message from Chairman <ul style="list-style-type: none"> <li>▪ Concept</li> <li>▪ Scripting</li> <li>▪ Editing</li> <li>▪ Production</li> </ul>	Agents	
<b>Slides</b>	Work with speakers to define and develop slides for launch <ul style="list-style-type: none"> <li>▪ Editing</li> <li>▪ Rehearsals</li> </ul>	Agents	
<b>Speaker Handouts</b>	Work with speakers to define and develop appropriate handouts <ul style="list-style-type: none"> <li>▪ Slide copies</li> <li>▪ Other materials</li> </ul>	Agents	
<b>Premiums</b>	<ul style="list-style-type: none"> <li>▪ Develop participant gifts that reflect concept and theme:               <ul style="list-style-type: none"> <li>▪ Take away gift distributed at the end of the meeting</li> </ul> </li> </ul>	Agents	
<b>Games</b>	<ul style="list-style-type: none"> <li>▪ Instant games can be played where prizes are won on the spot for answering questions on the website</li> <li>▪ Prizes may be points or items</li> </ul>	Agents	
<b>Survey</b>	<ul style="list-style-type: none"> <li>▪ Surveys to be completed at game tables as part of a Q &amp; A on the website benefits</li> </ul>	Agents	
<b>Raffle Drums/Prizes</b>	<ul style="list-style-type: none"> <li>▪ Completed raffle entry forms put into raffle drum for a grand prize drawing</li> </ul>	Agents	
<b>Kiosk for Prize Redemption</b>	<ul style="list-style-type: none"> <li>▪ Kiosk set up to show a catalog of prizes for the winners of instant prize points to redeem from – or to view their point banks.</li> </ul>	Agents	

## COMMUNICATIONS AT-A-GLANCE—Event Three

### 120 General Office Site Events

Tactic	Description/Objective	Audience	Timing
<b>MEETING IN A BOX</b>	<ul style="list-style-type: none"> <li>All items necessary for a successful launch will be shipped to each site prior to their launch event</li> </ul>	Agents	
<b>Event Handbook</b>	<ul style="list-style-type: none"> <li>Guide to running the event</li> <li>Activities</li> <li>Materials checklist</li> </ul>	Managers/ Event	
<b>Invitation / Raffle Form</b>	<ul style="list-style-type: none"> <li>Special invitation to all agents for their Local office meeting</li> <li>Each participant completes the entry form for a raffle prize drawing at the event</li> <li>Small gift reflecting theme goes along with invitation</li> </ul>	Agents	
<b>Posters</b>	<ul style="list-style-type: none"> <li>Posters to be hung at each of the sites with date, time and location</li> </ul>	Agents	
<b>Décor</b>	<ul style="list-style-type: none"> <li>Balloons, music, decorations for event space</li> </ul>	Agents	
<b>Premiums</b>	<ul style="list-style-type: none"> <li>Develop participant gifts that reflect concept and theme:                             <ul style="list-style-type: none"> <li>Take away gift distributed at the end of the meeting</li> </ul> </li> </ul>	Agents	
<b>Survey</b>	<ul style="list-style-type: none"> <li>Surveys to be completed at game tables as part of a Q &amp; A on the website benefits</li> </ul>	Agents	
<b>Games</b>	<ul style="list-style-type: none"> <li>Instant games can be played where prizes are won on the spot for answering questions on the website</li> <li>Prizes may be points or items</li> </ul>	Agents	

## COMMUNICATIONS AT-A-GLANCE—Post-Event

Tactic	Description/Objective	Audience	Timing
<b>Survey Deck</b>	<ul style="list-style-type: none"> <li>▪ Tabulate survey</li> <li>▪ Prepare deck for managers to review meeting results</li> </ul>	Agents	
<b>Online Usage Tracking</b>	<ul style="list-style-type: none"> <li>▪ Track the usage of each agent and the parts of the website used most frequently</li> </ul>	Agents	
<b>Meeting Highlights for Participants</b>	<ul style="list-style-type: none"> <li>▪ After meeting communications to participants with:               <ul style="list-style-type: none"> <li>▪ Survey results</li> <li>▪ Thanks for attending</li> <li>▪ Key highlights from speaker (other than what was in highlights)</li> <li>▪ Reminder of key benefits to using AP</li> </ul> </li> </ul>	Agents	
<b>Meeting Highlights for Company</b>	<ul style="list-style-type: none"> <li>▪ Meeting highlights put online for everyone to learn about meeting</li> <li>▪ Generates excitement about meeting</li> <li>▪ Provides highlights of information</li> </ul>	Agents	