

What Works:



Erie
Insurance®

Above all in sERvICe—since 1925

Who: Robin Tinsley, principal Agent, Sabatino Insurance Agency, Pen Argyl, Pennsylvania.

What: Secure Your Legacy mailing—Create a list and mail marketing materials designed for ErieSecure LifeSM and ErieSecure Life PlusSM Erie Family Life's high end Universal Life insurance policy.

Benefit



I submitted over \$23,000 in life insurance premium from one mailing.

I mailed to my prospects and the office phone rang. I received 10 calls from a list of 101 customers, nearly a 10% response rate. Far exceeding the typical 1-3.7% rate suggested by the Direct Marketing Association's 2015 Response Rate Report.

Insider Tips (FAQs)



Since the ErieSecure LifeSM marketing materials are bigger, heavier and delivered to appeal to a higher demographic of customer, the pieces cost more than the average direct mail piece. A cost effective way of using the materials is to mail to a list with a minimum of 101 customers. At this number, the piece rate drops to \$1.50 each for piece S1662, and \$1.67 each for AC1633.

Resources



ErieSecure Life BrochureSM (EFL702), a customer friendly piece describing the ErieSecure life product.

Make it Simple to Market Life (EFL9046), this piece lays out the simple steps to create a life targeted mailing.

ErieSecure Life Fact Sheet (EFL211), detailed information about ErieSecure LifeSM and ErieSecure Life PlusSM

How to Get Started



I created a prospect list of 101 people in MyMarketing using Manage My Customers and the life filters. I began with my personal lines customers between the ages of 30 and 54 that do not have a life insurance policy but have a household income of at least \$50,000. I selected S1662, the ErieSecure LifeSM Letter and Booklet

I mailed the pieces at a cost of \$1.50 each (Marketshare eligible)

Next Steps



Within a few days of mailing, the office began receiving inquiries about life insurance.

Personal phone calls to the customers on the list also helped increase appointments.

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Who: Agent Mike Felty of Felty Insurance Agency in Bristol, Virginia.

What: Shift—A competition allowing students to compete on behalf of their schools to encourage teens to practice and share messages about safe driving. Students use an interactive website (jointheshift.org) to learn about distracted driving and earn points in the process. The 2016 Shift contest includes \$20,000 in prizes from Erie Insurance. A total of 16 prizes will be awarded: 4 school prizes and 12 student prizes. Contest period is August 29-October 21, 2016.

Benefit



It's a really great program and it was amazing seeing the kids, and even the principals, get so involved. This program was as much for me as it was for the students. The extra time and effort put in outside the office was worth it to spread the safe driving message—and potentially save a life. I look forward to getting involved again this year and would definitely recommend it to other Agents.

Insider Tips (FAQs)



To help promote the program, Mike set up at football games and encouraged parents to get involved as well. His involvement benefitted both of the schools and himself simultaneously: the real life rivals both ended up winning cash prizes and Mike received a lot of recognition for his help.

Felty Insurance presented more than \$15,000 in prizes to the schools and students during a rival basketball game. As a result the agency received notoriety at the game, as well as in the media attention via TV and newspaper.

Resources



(S1589) Shift Starter Kit, (S1570) Things You Need to Know Posters, (S1571) Contest Promotion Posters, (S1573) Don't Text and Drive Window Clings, (AC1411) Pledge Certificate, (S1582) Shift Brochures, (AC1417), (AC1418), (AC 1412) Postcards, (S1588) Marketing Assist

How to Get Started



Contact the principal, guidance counselor or other faculty member to schedule a meeting to introduce yourself and the Shift program. Make sure to mention the Shift contest and the opportunity for the school and students to win prizes during the contest period (August-October 2016).

Next Steps



Meet with the school's contact person and follow up with the school.