

Drip Marketing Campaign

For PlanSource Elite Brokers

*Benefits Administration*

*Updated April 2017*

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# Drip Marketing Overview

Drip email marketing campaigns are a sequence of email messages sent, usually via marketing automation software to a set of contacts according to their preferences, needs or interests. To develop an effective drip campaign, you will need the following:

1. **A Good List:** You’ll need a list of contacts that at a minimum, includes their email address. But the more you know about an individual, the more effective you will be able to tailor the content to the reader. For example, if you know their first name, you can customize each email with the individual’s first name. You will also be able to “segment” the list, which means sending different messages to different groups that have different preferences.
2. **Interesting Content:** All of the content marketing rules for designing and sending effective emails apply to drip marketing – but the most important rule is to keep communications simple and engaging. Remember, the goal of the email is to get them to open the email and take whatever action you want them to take. And by keeping content educational, interesting and targeted, you can minimize the number of people who unsubscribe.
3. **Appropriate Cadence:** If you automate an email campaign where you are just touching customer routinely with no thought to the strategy and end-goal, the program is likely to underperform. Ask yourself these five questions before you plan out the cadence:
	1. Who is the target audience?
	2. How do they want to be communicated with (e.g., email, call, social media)?
	3. What type of content do they want to see (e.g., value points, peer evidence, features, best practices)?
	4. What happens when a prospect “raises their hand” or fails to respond? (e.g., who has the ball?)
	5. How will the activities move prospects towards, into and out of the sales pipeline?

In terms of timing, best practices suggest that contacts should be spaced in accordance with the length of the sales cycle - the shorter the sales cycle, the shorter the time between contacts. In general, anywhere between 6 and 45 days is acceptable. 6 days between contacts avoids the risk of emailing someone twice in one week.

It is also worth thinking about how the drip campaign can use multiple methods of communication. Not all buyers have the same communication preferences and varying up the approach can help maximize results.

1. **Meaningful Measurements**: To effectively judge the performance of your drip campaign, the variables measured depend on which communication channels are being used. It is easy to get stuck in “analysis paralysis,” but here are some measurements to start with:
	1. For emails, you should measure:
		1. **Delivery Rate** - The number of emails that were received out of those sent
		2. **Open Rate** - The number of emails opened out of those that were delivered
		3. **Call to Action (CTA) Rate** - The number of emails where action was taken out of those opened
	2. For phone calls, you should measure:
		1. **Call Rate** - The number of calls that were made out of those possible
		2. **Answer Rate** - The number of phone calls answered out of those called
		3. **Meeting Rate** - The number of meetings scheduled out of those answered

# Drip Marketing Program Structure

To help you get started as an Elite Broker, PlanSource recommends starting simple. Starting simple will allow you to perfect the process before increasing in complexity. By starting your marketing program in pilot mode and eventually moving it to a commercial scale, you will learn what resonates and what doesn’t for your target markets. Over time, your marketing will scale to be more effective in generating demand.

PlanSource recommends starting simple with a three-email drip campaign. This means that three emails will be sent to contacts in your target market. Over time, you can integrate different channels into your drip campaign such as direct calls, social media or events, or different collateral such as videos, case studies, white papers or infographics.

Like cadence, segmentation should start simple and increase in granularity (i.e. complexity) over time as the method is perfected and performance improves. When marketing PlanSource’s benefits administration system, we recommend segmenting your target market into three categories to start:

* **New Broker Customers** – Companies you do not currently do business with but want to
* **Existing Customers, Not Using PlanSource** – Companies you currently do business with, but they don’t use PlanSource
* **Existing Customers, Using PlanSource** – Companies you currently do business with, and they already use PlanSource

For a drip campaign composed of three emails, PlanSource recommends using the following cadence over a 20-day period:

| **Schedule** | New Broker Customers | [Existing Customer, Not Using PlanSource](#id.kpiph79263wb) | [Existing Customer, Using PlanSource](#id.g5gj90rdg4xv) |
| --- | --- | --- | --- |
| Day 0 | [New Broker Customers - Email #1](#id.tnc5rvydayok) | [Existing Customer, Not Using PlanSource - Email #1](#id.nm722i6jsifh) | [Existing Customer, Using PlanSource - Email #1](#id.vwyq2gvg4v5i) |
| Day 10 | [New Broker Customers - Email #2](#id.tnc5rvydayok) | [Existing Customer, Not Using PlanSource - Email #2](#id.i85mllegvse9) | [Existing Customer, Using PlanSource - Email #2](#id.kv9tfp68jn5f) |
| Day 20 | [New Broker Customers - Email #3](#id.gwexycqfap8i) | [Existing Customer, Using PlanSource - Email #3](#id.i85mllegvse9) | [Existing Customer, Using PlanSource - Email #3](#id.2bhzmax8ykxl) |

# Three-Email Drip Campaign Details

## New Broker Customers

### New Broker Customers - Email #1

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| --- |
| **Subject** |
| Option #1 – Can I Make Your Life Easier? Option #2 ­– Mobile-Friendly Benefits Shopping Option #3 – Need a better way to manage ACA compliance? Option #4 – Help Employees Make Better Benefit ChoicesOption #5 – Tired of Paper? |
| **Body** |
| Hi <FIRST NAME>, We’re pleased to let you know that <Elite Broker Name> has partnered with PlanSource to offer an industry-leading cloud-based benefits technology platform. If you’re not familiar with PlanSource, they provide software and services that make your life easier, including: * A modern, mobile-friendly benefits shopping and enrollment experience for employees
* Communication tools, personalized recommendations and educational videos to help your employees understand the benefits you offer and how to use them
* Flexible configurations to support even the most complex benefit programs and employee populations
* Self-billing and invoice reconciliation tools
* ACA measurement and reporting, including the ability to generate and transmit Forms 1094-C and 1095-C
* Strong partnerships with insurance carriers that provide financial credits, making PlanSource an affordable choice

Check out a [quick (90 second) video](https://plansource.com/benefitsadministrationvideo/) of the PlanSource Benefits Administration platform. If you’re interested in learning more, let’s set up a time to chat for 15 minutes. You can either reply to this email or give me a call at my number below. Sincerely, <SIGNATURE> |
|  |

### New Broker Customers - Email #2

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| **Subject** |
| Option #1 – Re: Can I Make Your Life Easier? Option #2 ­– Re: Mobile-Friendly Benefits ShoppingOption #3 – Re: Need a better way to manage ACA compliance? Option #4 – Re: Help Employees Make Better Benefit ChoicesOption #5 – Re: Tired of Paper? |
| **Body** |
| Hi again <FIRST NAME>, How is your team handling benefits administration today? I’d love to be able to tell you how we can help make your life easier with a modern, mobile-friendly shopping and enrollment experience that your employees will love. Nearly 10,000 employers and 3.5 million consumers use the PlanSource Platform for benefits shopping, enrollment, billing, compliance and administration. <Agency Name> has been trained and certified to act as the point of contact for the PlanSource system. (Check out [this infographic](http://plansource.com/collateral/About-PlanSource.pdf) to learn more).Do you have 15 minutes for a quick chat this week? You can either reply to this email or give me a call at my number below. Sincerely, <SIGNATURE> |
|  |

### New Broker Customers - Email #3

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| --- |
| **Subject** |
| Could You Connect Me With The Right Person? |
| **Body** |
| Hi <FIRST NAME>, Sorry we haven’t been able to connect in recent weeks regarding an opportunity to automate your benefits administration processes with a cloud-based solution from our technology partner, PlanSource. If you are not the right person to speak with, could you connect me with the person responsible for HR and benefits in your company? Sincerely, <SIGNATURE> |
|  |

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## Existing Customer, Not Using PlanSource

### Existing Customer, Not Using PlanSource - Email #1

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| --- |
| **Subject** |
| Option #1 – Can I Make Your Life Easier? Option #2 – Need a better way to manage ACA compliance?Option #3 – Mobile-Friendly Benefits ShoppingOption #4 – Help Employees Make Better Benefit ChoicesOption #5 – Tired of Paper? |
| **Body** |
| Hi <FIRST NAME>, You may already know this, but <Elite Broker Name> has partnered with PlanSource to offer you an industry-leading, cloud-based, and mobile-friendly benefits technology platform. If you’re not familiar with PlanSource, they offer some easy-to-use tools to make your life easier, including: * A modern, mobile-friendly benefits shopping and enrollment experience for employees
* Communication tools, personalized recommendations and educational videos to help your employees understand the benefits you offer and how to use them
* Flexible configurations to support even the most complex benefit programs and employee populations
* Self-billing and invoice reconciliation tools
* ACA measurement and reporting, including the ability to generate and transmit Forms 1094-C and 1095-C
* Strong partnerships with insurance carriers that provide financial credits, making PlanSource an affordable choice

Check out a [quick (90 second) video](https://plansource.com/benefitsadministrationvideo/) of the PlanSource Benefits Administration platform. If you’re interested in learning more, could you grab 15 minutes to talk? If you’re interested in learning more, let’s set up a time to chat for 15 minutes. Sincerely, <SIGNATURE> |
|  |

### Existing Customer, Not Using PlanSource - Email #2

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| --- |
| **Subject** |
| Option #1 – Re: Can I Make Your Life Easier? Option #2 – Re: Need a better way to manage ACA compliance?Option #3 – Re: Mobile-Friendly Benefits ShoppingOption #4 – Re: Help Employees Make Better Benefit ChoicesOption #5 – Re: Tired of Paper? |
| **Body** |
| Hi again <FIRST NAME>, Are you familiar with PlanSource? I’d love to be able to tell you about our new partnership with PlanSource and how we can help make your life easier with a modern, mobile-friendly shopping and enrollment experience that your employees will love. Nearly 10,000 employers and 3.5 million consumers use the PlanSource Platform for benefits shopping, enrollment, billing, compliance and administration. <Agency Name> has been trained and certified to act as the point of contact for the PlanSource system. (Check out [this infographic](http://plansource.com/collateral/About-PlanSource.pdf) to learn more).If you’re interested in learning more, could you grab 15 minutes to talk? You can either reply to this email or give me a call at my number below. Sincerely, <SIGNATURE> |
|  |

### Existing Customer, Not Using PlanSource - Email #3

|  |
| --- |
| **Subject** |
| Could You Connect Me With The Right Person? |
| **Body** |
| Hi <FIRST NAME>, Sorry we haven’t been able to connect in recent weeks regarding an opportunity to automate your benefits administration processes with a cloud-based solution from our technology partner, PlanSource. If you are not the right person to speak with, could you connect me with the person responsible for HR and benefits in your company? Sincerely, <SIGNATURE> |
|  |

## Existing Customer, Using PlanSource

### Existing Customer, Using PlanSource - Email #1

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| **Subject** |
| Overworked HR team, we can help! |
| **Body** |
| Hi <FIRST NAME>, <Elite Broker Name> is proud to be your strategic HR advisor. And as an existing user of PlanSource for online benefits administration, I wanted to let you know that PlanSource offers a full suite of [benefits administration services](http://www.plansource.com/services) that can make life easier for you and help you focus on more strategic priorities. Some of these services include: * Full benefits outsourcing, where PlanSource administers your entire benefits program on your behalf
* Billing reconciliation and payment services (so the only thing you have to do for carrier invoicing each month is make ONE consolidated payment!)
* Branded employee contact center with licensed and Spanish-speaking agents
* ACA measurement and reporting, including the ability to generate and transmit Forms 1094-C and 1095-C (and they can mail 1095-Cs to your employees, too!)
* Dependent eligibility audits and ongoing document verification
* Custom employee communication campaigns, including print and digital benefit guides, websites, posters/post cards, total compensation statements, videos and email and text messaging campaigns
* COBRA and HSA/FSA/HRA administration services

If you’re interested in learning more, do you have 15-minutes to chat? You can either reply to this email or give me a call at my number below. Sincerely, <SIGNATURE> |
|  |

### Existing Customer, Using PlanSource - Email #2

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| **Subject** |
| Re: Overworked HR team, we can help! |
| **Body** |
| Hi again <FIRST NAME>, Your teams are overworked and burdened by the demands of an HR department and meeting employee needs. We are here to help! As an existing PlanSource customer, you already know the value of a mobile-friendly shopping experience for your employees. Let us help you round out your benefit program and free up some of your time by taking advantage of PlanSource services for benefits outsourcing, billing reconciliation and payment, COBRA administration, HSA/FSA/HRA administration, dependent verification and employee commiunications.  See how you can [save money](https://plansource.com/products/services/dependenteligibilityaudits/) by staying accurate? Reply to this email if you have 15 minutes for a quick chat. Sincerely, <SIGNATURE> |
|  |

### Existing Customer, Using PlanSource - Email #3

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| --- |
| **Subject** |
| Could You Connect Me With The Right Person? |
| **Body** |
| Hi <FIRST NAME>, Sorry we haven’t been able to connect in recent weeks regarding an opportunity to free up some of your time by taking advantage of benefits admin services offered by our partner, PlanSource. If you are not the right person to speak to within your company, could you connect me with the person responsible for HR and benefits in your company? Sincerely, <SIGNATURE> |
|  |