

HOW TO USE YOUR INFOGRAPHIC

Client Engagement Pack

Value of an Insurance Specialist



Instructions for Advisers | Infographic



This infographic is designed to help increase people’s understanding of the value of personal insurance and why it’s important to engage the help of an Insurance Specialist.

It is written in simple, client-friendly language and uses icons to ensure it is easy to follow and enjoyable to read.

Here’s what to do:

1. Edit the logo on the front page and the contact information on the final page with your business details and relevant disclaimer (see next page for instructions how to do this).
2. Update the cover letter (where relevant) so it sounds like you wrote it.
3. Send to your prospects, existing clients and business partners to engage and nurture them so they work with you, stay with you, and refer you.

EDITING THE INFOGRAPHIC

You will get two versions of the infographic: a pdf version and a Word document. Choose whichever format works best for you.

Editing the PDF Document

To add your logo:

1. Click “Add your business logo here” box on the bottom of the front page (you only need to update it on the front page and it will carry through to the final page 8).

See image over the page for the location to add your logo.



2. Click “Browse.”

3. Navigate to your logo and select it (double click on the file or click it once and choose ‘Select’).

NOTE: Some computers may ask you to choose the logo’s format from the bottom right dropdown menu located above the “Open” button. Do this then navigate to your logo and select it (double click on the file or choose ‘Open’).

5. Click “OK.”

To resize or reposition your imported logo:

1. Go to “View” Menu and select “Tools” and “Content.”
2. Choose “Select Object” under “Add or Edit Interactive Object.”
3. Click on logo and resize/reposition.
4. Save as a new PDF; hit “escape” to return to view mode.

To add your contact details on the inal page:

This pdf document has editable fields next to each section of the contact page.

Put your cursor in the relevant section and type in your information. See image below for the editable sections available.

The fields available to update are:

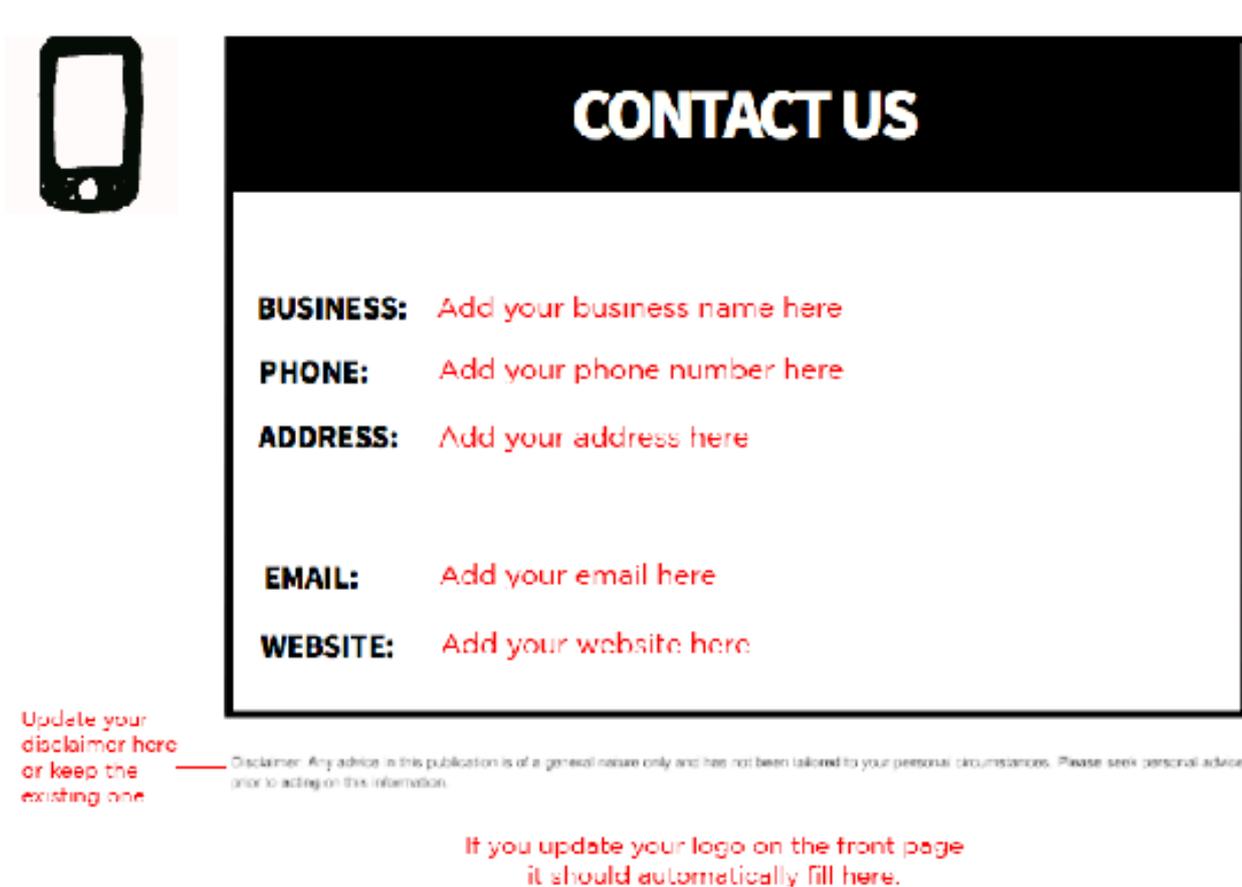
- Business Name
- Phone
- Address
- Email
- Website

Disclaimer: You can use the disclaimer provided or you can add your own.

To add your own, highlight the disclaimer in use and 'delete'.

Then either type in your version or copy it from another source and 'paste' in the disclaimer section.

Once all details have been updated, save the file in a convenient location for use.



Editing the Word Document

This is a normal Word document and all editing functions available in Word will apply.

I recommend that if you edit the Word document that you save it as a pdf before printing or emailing it to your clients as it will preserve any formatting and look more professional when your client receives it.

WAYS TO USE THE INFOGRAPHIC

The infographic contains eight pages and is designed to use in full, or as separate pages (the individual pages have been provided, too) and includes the following:

Page 1: Title page and a teaser for what's contained.

Page 2: I'm cluey enough to understand what my car insurance covers. What's so different about personal insurance (life insurance, income protection, TPD, critical illness)?

Page 3: If I need to make a claim, I just call up or lodge online, right? Why would I need someone to help me with that?

Page 4: I'm fit as a fiddle. My life hasn't changed. Why do I need to review my personal insurances each year?

Page 5: I have insurance in my superannuation. Why would I need more?

Page 6: Buying insurance on line seems so much faster and easier. Why would I bother going to see someone?

Page 7: I handle all our family's financial affairs. Why would I need help with my insurance?

Page 8: Your contact information.

SUGGESTIONS FOR USE | Using the Full Infographic

Here are a few ideas to use the full infographic document to educate more people about the value of personal insurance and your services.

- Send to prospects on your database to help them understand some of the concepts presented to move them closer to a meeting with you.
- Send to prospects before they come to your first meeting to increase their awareness.
- Send to prospects after their first meeting to reinforce your value.
- Send to business partners, referral partners, centres of influence etc. to educate them on the value of what you do and how you can help protect their clients.
- Provide as a handout when speaking at a seminar or event on the topic of personal insurance.

Using the Individual Pages

Pages 2-7 are designed to be used on their own as well (or a couple together) to support a message, remind clients of an important point, or as part of a promotional campaign.

You can access each page separately, add your logo, and send to your audience in digital (soft copy)* or print (hard copy) versions.

** It is advisable to send soft copy documents as a pdf to maintain the professional design. If you modify the Word version, make sure to save as a pdf before sending.*

TIP: Other Uses for the Content

You could use the full document or individual pages in the services section on your website or as an FAQ (frequently asked questions) page.

Food for thought!