

Nothing  
happens until  
the agent  
recommends  
Fireman's Fund.®

Distribution, Sales and Marketing

# Co-Marketing Guide

For Internal Use Only



**Fireman's Fund**<sup>®</sup>  
Insurance Company

A company of **Allianz** 



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# Introduction

The Co-Marketing Department offers a comprehensive suite of tools and strategies that drive profitable growth for our agency partners. Each campaign will be managed through an integrated approach using multiple channels for maximum impact.

Each campaign will:

- Carry consistent, clear, and powerful messages to the market.
- Be aligned with state business strategies to drive growth.
- Be repeatable, scalable, and deployed efficiently.
- Reflect customer and market insights that support the products we develop and promote.
- Be measurable.

# Process

Co-marketing campaigns begin in the field. The Fireman’s Fund® Territory Sales Director (TSD) works with his or her agency partners to determine goals and growth strategies. The TSD reviews these goals with their Regional Sales Executive (RSE) to ensure the proposed tactics align with the region marketing strategy. Upon approval, the TSD then collaborates with his or her Fireman’s Fund home office marketing contact to confirm strategies and to map out an effective plan of action.



# Goals

Co-marketing programs and tools are best used in combination to create fully integrated and impactful campaigns. Each campaign should focus on achieving at least one of the following goals:

Revenue

Leads

Awareness

Our ultimate goal is to generate revenue. But we cannot do this without building brand awareness and maintaining a solid universe of leads.

Before embarking upon a campaign, it is important to select a primary goal. Each goal drives a course of action and determines the components of a campaign. For instance, if an agency is looking to promote their services in a specific community, they might select an awareness building campaign (e.g., Fire Department Grant Ceremony) versus a Direct Mail campaign geared to generate leads.

# Programs and Tools

Below is a menu of available programs and tools, each aligned with one of three marketing goals. **Programs** are robust endeavors that can be enhanced with **supporting tools** for maximum impact. Each supporting tool offers an additional touchpoint with the audience. The more touchpoints – or contacts – you create, the more opportunities you have to get your message out.

Programs	Goal	Target Audience
Agency Contests	Revenue	Agents
Direct Mail (cross-sell)	Leads	Existing policyholders
Direct Mail (new business)	Leads	Prospect policyholders
Trade Show Booths	Leads	Policyholders
Hospitality Suites and Events	Leads	Agents/policyholders
Sponsorships	Awareness	Agents/policyholders
Fire Department Grants	Awareness	Policyholders/Prospects

Supporting Tools	Goal	Target Audience
Ads (print/web)	Awareness	Agents/policyholders
Brochures/Flyers	Awareness	Agents/policyholders
Agency Online Tools	Awareness	New and existing policyholders
Landing Pages	Awareness	Agents/policyholders
E-mail Communications	Awareness	Agents/policyholders

# Agency Contests

The primary and immediate goal of an agency contest is to drive specific agency behavior. Ultimately, these behaviors will result in **revenue**.

## Logistics

With most contests, agencies are offered an incentive to write more business. But sometimes we use contests to encourage agents to use new software platforms or generate quotes. Agency contests offer prizes/incentives to participating agency principals and, often, CSRs. Contests typically last three months, but there are exceptions.

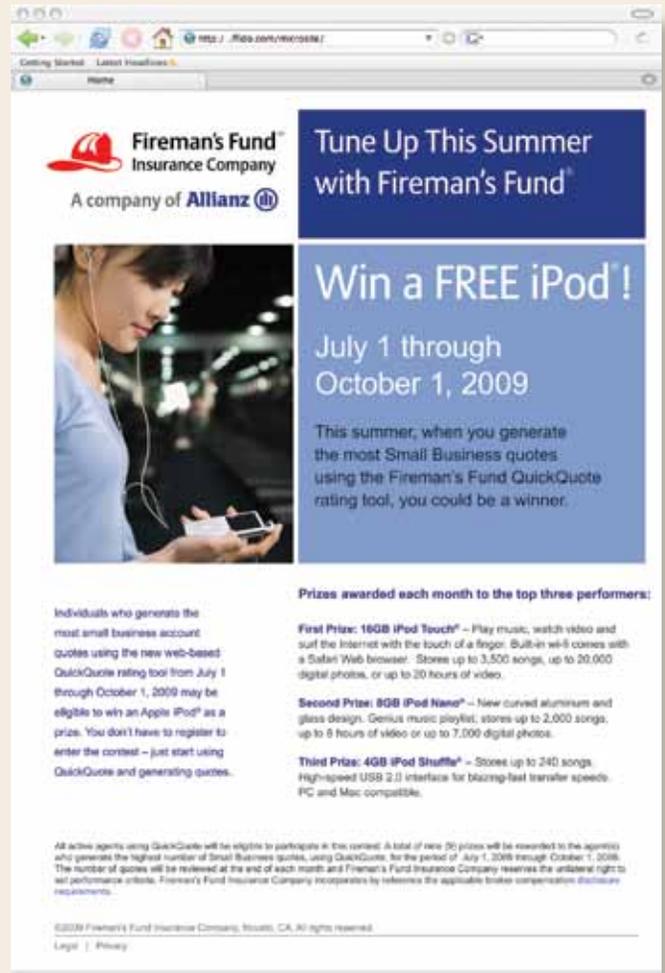
## Budget

Contest prices can range anywhere between \$5,000 and \$80,000 depending on the reach (states targeted) and the number of agencies expected to participate. Typically a contest should cost no more than 1.5% of the resulting incremental revenue gained.

## Timelines\*

The most effective contest is one with a fully-developed suite of supporting marketing tools, often requiring up to eight weeks of planning.

\*Timelines vary. Please consult with your marketing representative.

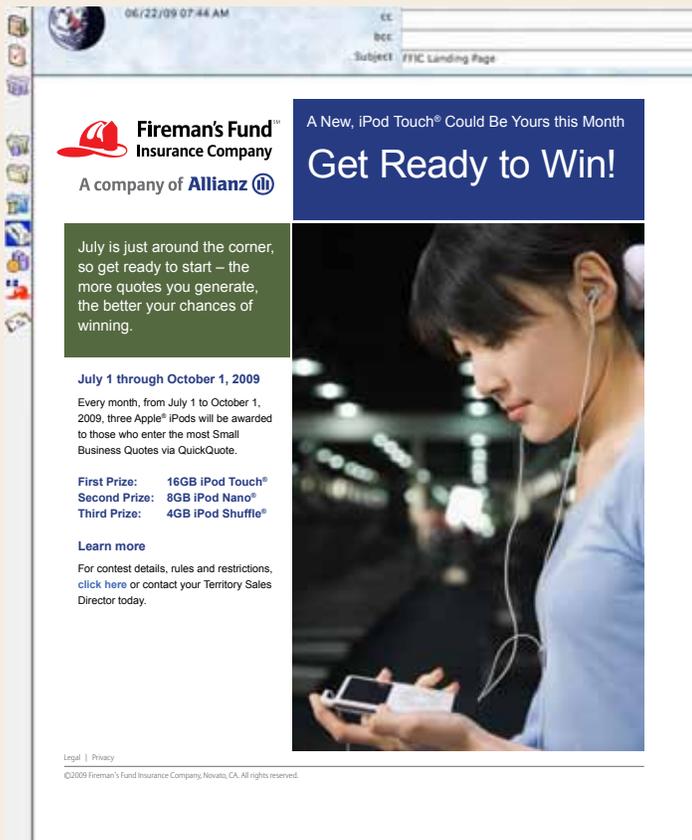


A. iPod contest web page

## Develop a Fully Integrated Campaign

Did you know you can support your contest with the following marketing tools for maximum effect?

- Flyers, posters
- Branded promotional items, gifts
- E-mail announcements
- Landing page, linked from flyer and e-mails
- Policyholder direct mail



B. iPod contest e-mail announcement



C. iPod contest flyer

# Direct Mail – Cross-Sell

A direct mail campaign is an effective way to generate **leads**, increase quote activity and promote retention.

## Description

A cross-sell mailing is one that solicits additional coverages from current customers. Mailings to existing customers usually generate higher response rates than “cold” mailings. A successful cross-sell mailing typically renders a 2% to 5% response rate.

## Budget

Direct mail campaigns range in price, depending on mail quantities and the type of package you are mailing. Components might include a letter, brochure and response card. A post card is much less expensive to produce and mail. Mailing costs for a package range from \$2 to \$3.

## Timelines

A well-planned direct mail campaign requires six to eight weeks of lead time.

\*Timelines vary. Please consult with your marketing representative.



A. Letter with response card

## Develop a Fully Integrated Campaign

Did you know you can support your direct mail campaign with the following marketing tools for maximum effect?

- Agency homepage content that reflects direct mail message.
- "Second hit" direct mail to non-responders.
- Co-marketing ad in select publications.

Not all insurance policies are created equal.

# Car insurance on *your* terms.

An auto policy that puts you in the driver's seat:

- Minimize depreciation.
- Use original manufacturer parts.
- Choose your own repair shop.
- Rent a car comparable to your own while yours is repaired.

Does your current policy provide these benefits?

And you qualify for a discount because you insure your home with <XYZ AGENCY> and Fireman's Fund®.



Prestige Auto® Premier  
From Fireman's Fund Insurance Company

Call for more information and we'll put a few gallons in your tank.

<PHONE NUMBER>  
<PHONE.EZ>

Fireman's Fund Insurance Company  
21775 Main Street  
Newport, CA 94958

BEST CLASS  
LEADERSHIP  
PAID  
SARILLI@MGS.COM  
PREMIER REG. 1000

<FIRST NAME> <LAST NAME>  
<ADDRESS>  
<CITY> <STATE> <ZIP>



**Fireman's Fund**™  
Insurance Company

A company of **Allianz**

# Direct Mail – New Business

A new business direct mail campaign is an effective way of generating **leads**.

## Description

The key to a successful new business direct mail campaign is the mailing list. The demographics of your list should perfectly match your target audience. Many agents have well-honed prospect lists they are willing to share. Association lists can often be rented or purchased for direct mail campaigns. A successful new business direct mail campaign typically renders a 1% to 2% response rate. So it is critical that your mailing list is large enough to generate an acceptable pool of leads.

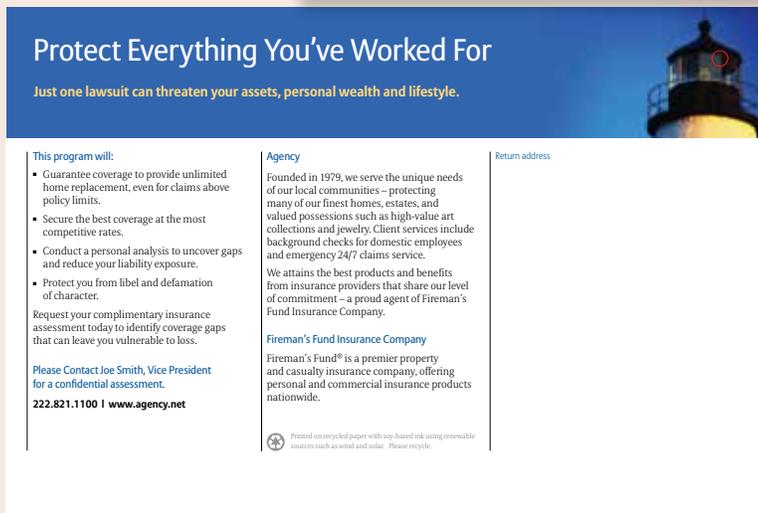
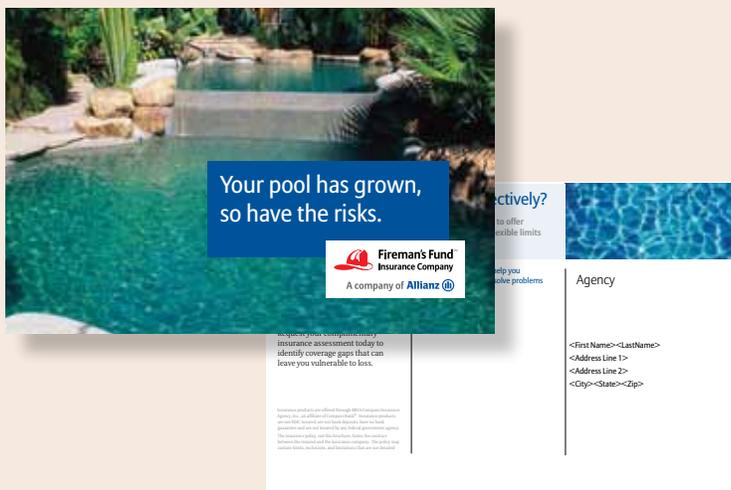
## Budget

Direct mail campaigns range in price, depending on the quantities and the type of package you are mailing. Components might include a letter, brochure and response card. A post card is much less expensive to produce and mail. Mailing costs for a package range from \$2 to \$3.

## Timelines\*

A well-planned direct mail campaign requires six to eight weeks of lead time.

\*Timelines vary. Please consult with your marketing representative.



A. Postcard

## Develop a Fully Integrated Campaign

Did you know you can support your direct mail campaign with the following marketing tools for maximum effect?

- Agency homepage content that reflects direct mail message.
- “Second hit” direct mail to non-responders.
- Co-marketing ad in select publications.



B. Postcard

# Trade Show Booths

Conventions can be an effective forum for meeting with potential customers and generating **leads**.

## Key Points

Before renting booth space, it's important to research the convention and determine how well the attendee list matches your ideal prospect profile. Additionally, it is important to select a conference that is well-attended, and a booth location that will be heavily trafficked.

## Budget

The average 10' x 10' booth space will range in price from \$2,500 to \$5,500, and an additional \$3,000 for shipping, electrical power, lead scanning device and audio/visual rental. New signage, brochures and displays will add to cost.

## Timelines\*

Booth space at the more popular trade shows can book up a year in advance. A well-prepared booth space will showcase up-to-date signage and displays, as well as the most current marketing support materials (brochures and flyers). Please allow six to eight weeks of preparation before the show date.

\*Timelines vary. Please consult with your marketing representative.



A. Greenbuild convention



B. Pull-up banners

## Develop a Fully Integrated Campaign

Did you know you can support your trade show presence with the following marketing tools for maximum effect?

- Flyers, posters.
- Branded promotional items, gifts.
- E-mail announcements.
- Landing page, linked from marketing materials.
- Policyholder direct mail.

www.firemansfund.com

www.firemansfund.com/green

The first of its kind:  
Green Insurance For Buildings and Homes

www.firemansfund.com

Fireman's Fund Insurance Company  
A company of Allianz

Fireman's Fund Insurance Company  
A company of Allianz

C. Trade show booth display

# Hospitality Suites and Events

Hosting a cocktail party or event can be an effective means for generating **leads**.

## Description

Events in tandem with a scheduled convention or gathering: A hospitality suite can enhance your presence at a convention and is an opportune way to meet with a captive group of existing and prospective customers. Typically these events are hosted in a ballroom, suite, or restaurant at the main convention hotel, or at a hotel near the convention site. Here, attendees can enjoy cocktails, appetizers, light dinner fare, and easy conversation.

Independent Events: Social gatherings such as these are not limited to conventions. You can host a Fireman's Fund event at the destination of your choice.

## Budget and Timelines\*

The venue for the party/event needs to be booked, sometimes, months in advance. Invitations should mail at least six weeks in advance followed by reminders. The price can range anywhere from \$5,000 to \$50,000, depending on venue, equipment rental requirements, menu, and number of attendees.

\*Timelines vary. Please consult with your marketing representative.



## Develop a Fully Integrated Campaign

Did you know you can support your Hospitality Suite/Event with the following marketing tools for maximum effect?

- Trade show booth.
- Online registration and e-mail invitations.
- Branded promotional items.
- Post event mailings.
- Displays, signage.



# Sponsorships

Conventions can provide ideal forums for cultivating brand and product **awareness** with potential customers.

## Description

In addition to booth rentals, many conventions offer sponsorships as an additional venue through which you can display your logo, and sometimes distribute your marketing materials. Sponsorship vehicles can include the conference show guide, speaker sessions, luncheons, cocktail receptions, and related giveaway items such as water bottles, conference badges and conference tote bags.

Sponsorships aren't limited to convention sites. Private and themed gatherings (e.g., theatre productions, festivals, Oscar parties, art exhibits) often offer branding opportunities in exchange for financial support.

## Budget and Timeline\*

Sponsorships, like trade show booths, can sometimes book months in advance. A sponsorship can range anywhere between \$5,000 and \$100,000.

\*Timelines vary. Please consult with your marketing representative.



A. Educational track at the 2008 Greenbuild convention



B. Concourse d'Elegance

## Develop a Fully Integrated Campaign

Did you know you can support your sponsorship with the following marketing tools for maximum effect?

- Trade show booth.
- Hospitality suite.
- E-mail announcements/invitations.
- Branded promotional items.
- Post event mailings.



C. Newport event

# Fire Department Grant Ceremonies

Grant events are the perfect way to gather the media, community leaders, and prospects to generate **awareness**.

## Description

The Heritage Program® is an ongoing corporate philanthropy program that enables our agents to direct grants to fire departments and fire and burn prevention programs.

## How it works

Agents enrolled in the Heritage Reward<sup>SM</sup> program accrue points to be redeemed for grants to local fire departments for equipment, training and community education. The grants are awarded at an event, often at the selected fire department, and attended by community leaders, clients, prospective clients, and the media.

## Budget and Timelines\*

Fireman's Fund® works with agencies to customize each event. The check presentation ceremony can take two or more months to plan. Costs to the agency vary, depending on marketing support selected.

\*Timelines vary. Please consult with your marketing representative.



A. Ribbon cutting and presentation of Alpharetta Safety House

## Develop a Fully Integrated Campaign

Did you know you can support your grant with the following marketing tools for maximum effect?

- Press release.
- Fire chief testimonial.
- Pre-and post grant mailings and invitations.
- E-mail invitations.
- Banners and signage.



B. Check presentation for Safety House

# Ads (Print and Web)

Advertising is an effective means of making a lasting impression and generating public **awareness** about our brand and products.

## How it works

Working with your marketing representative, you can create an ad for placement in conference programs, newsletters, trade journals and online sites. You can also create a co-marketing ad that builds brand awareness for both your partnering agency and Fireman's Fund®.

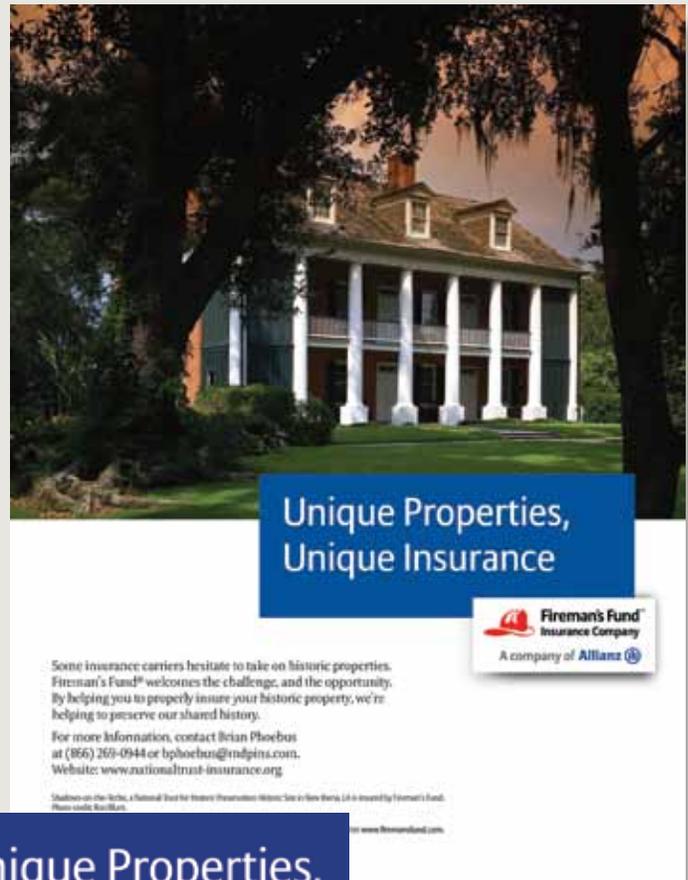
## Budget

Frequency is the key to effective advertising campaigns. When your message appears in the same vehicle (journal, site) week after week, month after month, your message becomes indelible in the reader's mind. Prices vary per journal and site. Please ask your marketing contact for a quote.

## Timelines\*

Publications and magazines tend to book ad space a month in advance; the lead time is shorter for web site advertising. Please allow three weeks to write and design a new ad.

\*Timelines vary. Please consult with your marketing representative.



Print



Web

# Brochures and Flyers

Collateral materials make great leave-behinds for agency visits and help build brand and product **awareness**.

## How it works

You can collaborate with an agency to create co-marketing materials that showcase our partnership and combined expertise. In this way, you are helping agencies promote their brand and effectively target their sales efforts.

## Budget

Prices vary by format of your printed piece as well as quantities.

## Timelines\*

Brochures and flyers take approximately three weeks to write and design. Add another two weeks for printing.

\*Timelines vary. Please consult with your marketing representative.

Offering More to Commercial Insurance Customers

## Insuring Your Skilled, Assisted and Independent Living Facilities

Fireman's Fund Insurance Company  
A company of Allianz

A customized solution ranging from property, liability, and auto coverage to policy options like prior acts, crisis management and data compromise.

We know how to put the pieces together into a comprehensive package that gives you tremendous asset protection.

**Fireman's Fund Insurance Company**  
Whether you operate a small or a large, multi-unit senior living facility, Fireman's Fund can tailor a program to meet your requirements. Our end-to-end risk management solutions include liability offered on an occurrence basis, giving you an attractive alternative to claims-made bases. We can handle past exposures – making us one of the few carriers to provide such high quality cross-concern coverage.

**Innovative Coverage and Solutions**

- General and Professional Liability on an occurrence basis – not a claims-made basis – means less choice for gaps in your coverage.
- Professional liability aggregate limits by \$1 million, offering broader protection for your facility.
- Three Acts coverage (claims-made occurrence) that bridges any gaps you may have when moving to a different form.

Every cherished possession has a story

100-year-old silver teapots, a diamond bracelet, a family heirloom – these are the treasures that make life special. And they're worth protecting. Fireman's Fund offers the finest art of insuring your collections. We'll help you identify, inventory and protect your most treasured possessions. So you can enjoy them for generations to come.

Fireman's Fund Insurance Company  
A company of Allianz

Pizza Delivery Coverages

Fireman's Fund Insurance Company  
A company of Allianz

Every cherished possession has a story

100-year-old silver teapots, a diamond bracelet, a family heirloom – these are the treasures that make life special. And they're worth protecting. Fireman's Fund offers the finest art of insuring your collections. We'll help you identify, inventory and protect your most treasured possessions. So you can enjoy them for generations to come.

Fireman's Fund Insurance Company  
A company of Allianz

# Agency Online Tools

This innovative co-marketing tool will help build **awareness** among new and existing customers.

## Description

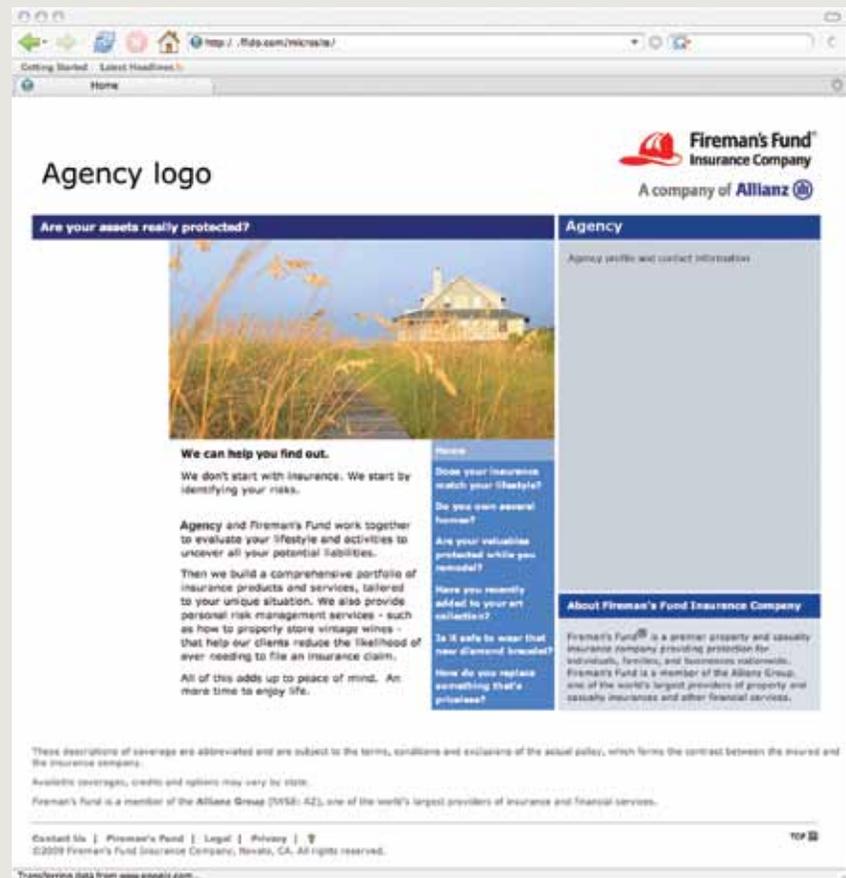
A Fireman's Fund® branded and formatted column appears on the agency's homepage and links to a fully-designed landing page featuring information and tools such as:

- Fireman's Fund coverage scenarios
- Risk management tips to reduce claims
- Safety bulletins
- Online newsletter

## Budget and Timelines\*

Currently no costs are associated with the development of these tools and require a minimum of three weeks of production time.

\*Timelines vary. Please consult with your marketing representative.



# Landing Pages

A landing page is an ideal way to inform agents about certain promotions, and generate enthusiasm and **awareness**.

## Budget

Currently there are no hard costs associated with landing pages.

## Timelines\*

Landing pages take approximately three to four weeks to write, design and program.

\*Timelines vary. Please consult with your marketing representative.

The screenshot shows a web browser window displaying a landing page for a contest. The page features the Fireman's Fund Insurance Company logo, which includes a red fire helmet icon and the text "Fireman's Fund Insurance Company" and "A company of Allianz". The main headline reads "We invite you and your team to participate in our Fire Up with Fireman's Fund contest". Below this, a large blue box contains the text "Win a FREE Weber® Gas Grill!". To the right of this text is a photograph of a Weber gas grill with food cooking on it. The contest dates are "July 1 through October 1, 2009". A small image of the Weber Spirit Gas Grill LP is shown on the right side of the page. The text below the dates states: "This summer, when you hit your target goal, you'll win a Weber Spirit Gas Grill LP." The "The Grand Prize\* Weber grill includes:" section lists:

- Two stainless steel burners at 26,000 BTUs
- Porcelain-enameled cooking grates
- 528 square inch total cooking area
- Right and left hand condiment baskets

The "PLUS monthly gifts" section lists:

- July: BBQ Grill Gift Basket** – includes non-stick fish grill, oak chips, BBQ sauce, chips and salsa.
- August: Sizzler Gift Set** – includes party cooler, apron, oven mitt and BBQ tools.
- September: Four Piece Grill Set** – includes grill brush, spatula, basting brush and tongs.

Footnote: \*Winning agencies can choose between two available Grand Prizes: The Weber Spirit Gas Grill LP, or multiple (up to 8) BBQ Grill Gift Baskets.

All active agents will be eligible to participate in the contest. Every agency can win. One Weber grill will be awarded to each agency that meets or surpasses the new business production in written premium goal (set by Fireman's Fund Insurance Company) from July 1, 2009 through October 1, 2009, in the category of Personal Insurance. Fireman's Fund Insurance Company reserves the unilateral right to set performance criteria.

Monthly gifts will be automatically awarded to each participating agency—one gift for each month of the contest's duration—a total of three gifts in all. Participation in the contest is the only qualification for receiving the monthly gifts; monthly gifts are not contingent upon performance. Fireman's Fund Insurance Company incorporates by reference the applicable broker competition disclosure requirements.

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Legal | Privacy

# E-mail Communications

E-mails generate **awareness** and can be used as either invitations or simply to impart information.

## Description

E-mails can be used as either invitations, or a tool to promote a contest or product, or simply as a vehicle to impart information.

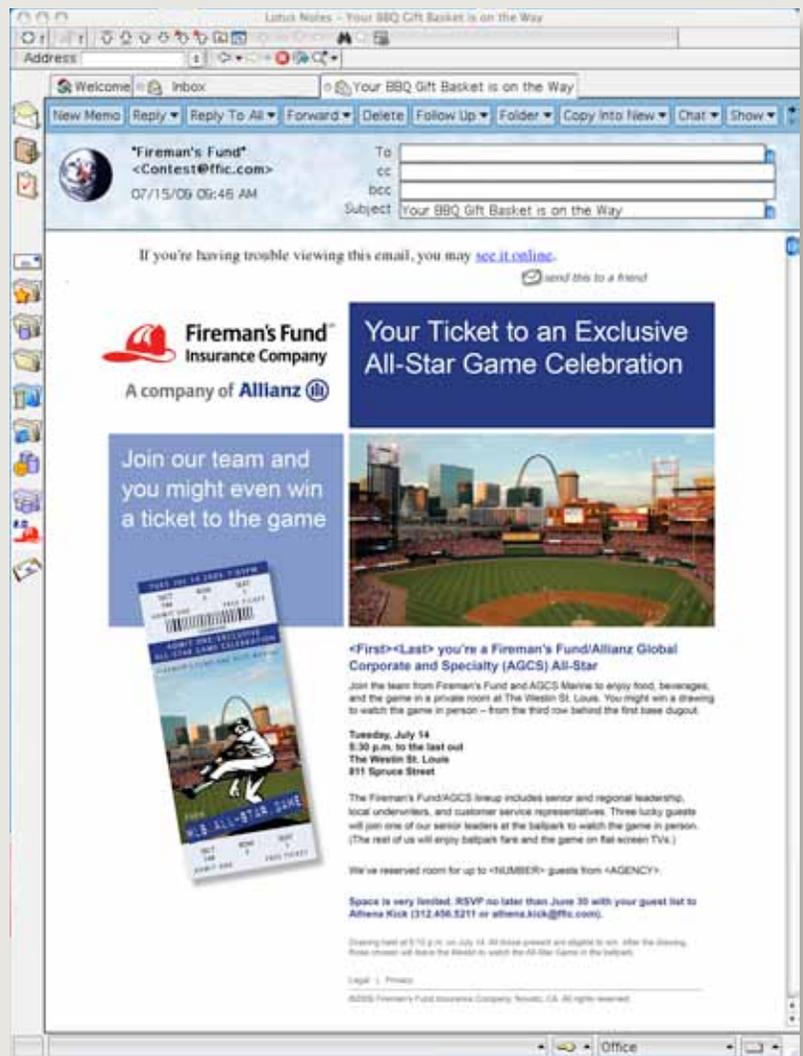
## Budget

The html coding required for a formatted e-mail costs approximately \$400 - \$600.

## Timelines\*

An html e-mail requires about three to four weeks to write, design, and program.

\*Timelines vary. Please consult with your marketing representative.



# Integrated Campaigns

The ideal marketing campaign should focus on achieving one of three primary goals:

Revenue

Leads

Awareness

A fully-integrated campaign allows you to supplement your primary program with supporting tools such as trinkets, direct mail, print ads, and e-mail communications. These tools ensure that you have multiple touchpoints – or contacts – with your target audience. The more touchpoints in your campaign, the better you are able to generate visibility, develop a strong universe of prospects, and drive new business and high retention rates.

The following are just a few examples of integrated campaigns that start with a primary goal and focus, and are supported by a variety of tools. Your home office marketing representative can assist you in building an integrated campaign to meet your specific needs.

# Revenue Generation

When meeting with a Fireman's Fund® TSD, the agency principal agrees he'd like to do more high net worth cross-selling, but can't seem to motivate his CSRs. He asks for our help in creating a robust incentive plan for his staff.

## Agency Contest

Limo-driven night on the town for all CSRs and their colleagues if agency meets its pre-determined goal for cross-selling.

Marketing includes:

- Flyers and posters delivered to staff prior to contest.
- Prizes/incentive.

### Additional Tools and Programs

E-mail Announcements – Sent every few weeks to participants.

Landing Page – Flyers, posters and e-mails link to this.

Giveaways and Trinkets – Delivered during contest to generate enthusiasm.

Direct Mail – Sent to a policyholder list provided by the agency.

# Lead Generation

When meeting with a TSD, the agency asks for our help in cultivating a database of qualified leads. The agency's focus is Commercial Real Estate, and it happens that next fall, the Building Owners and Managers Association is holding their annual conference in his state.

## Trade Show Booth

Booth signage, displays and marketing materials shared by Fireman's Fund® and participating agency.

### Additional Tools and Programs

Print Ads – In local real estate journals inviting attendees to the booth.

Hospitality Suite – Agents and potential policyholders invited for cocktails at nearby location during the conference.

Marketing Includes:

- Direct mail invitations send to prospective policyholders/conference attendees.
- E-mail Invitations send to prospective policyholders/conference attendees.

Follow-up E-mails – Sent to booth and event attendees.

# Awareness Generation

Agency X has been growing steadily with us for years. The principal opened a branch office in Tucson Arizona last month, and has had difficulty getting traction. He asked his TSD for support in gaining visibility for both his agency and our products.

## Fire Department Grant Ceremony

Select a high-profile venue in which to host an event that brings the press, potential policyholders together for celebration.

Marketing includes:

- Press releases.
- Signage.
- Brochures and flyers.

### Additional Tools and Programs

Print Ads – Announcing event;

E-mail Invitations – Sent to potential policyholders/attendees.

Direct Mail – One to attendees, one to no-shows.