



FINANCIAL ADVISORS

Business Development Service

Email Automation Process Flow

for

KiwiSaver Top-Up Reminders

Introduction

The KiwiSaver top up reminder automation is designed to provide your KiwiSaver clients who have not taken advantage of the maximum government contribution with personalised instructions on how to top up their fund. The emails will contain personalised information such as the top up amount, policy number and their IRD number, etc.

The email the client receives should enable them to top up their KiwiSaver fund without needing to contact you or your admin staff for further details or assistance.

Required Data

The following data is required for this automation to work:

- First Name
- Email Address
- Provider
- Top-up amount required (supplied by provider, see points for consideration below)
- Member or Policy Number
- IRD Number
- Trigger Date (stored as a custom field – the date on which this automation should start)

Process Flow

1. The automation will be triggered on the on the Trigger Date.
2. When the automation starts, all clients in the KiwiSaver list will be sent the 'KiwiSaver Top-Up Reminder' email ONLY IF all required data is present.
 - a. Contacts who do not have all required data present will not enter the automation. For contacts where a top-up amount is not available from the provider, we can amend the automation to send a generic reminder – see the Points for Consideration section below for more details)
3. The automation will wait for 3 days

4. The automation will check to see if the contact has opened the Kiwisaver top-up reminder email.
5. If the contact has opened the email the automation will end.
6. If the contact has not opened the email, the 'Kiwisaver top-up reminder' email will be sent again.
7. The automation will end.

Points for Consideration

The process described above is intended to provide a simple, automated KiwiSaver top-up reminder process for all KiwiSaver clients. Only clients in the 'KiwiSaver Client' List will receive these reminders – to stop clients receiving the reminder just remove them from the KiwiSaver Client List.

The following points should also be considered when setting up the policy renewal reminder process:

Email wording

You can change the wording of the emails your contacts receive to suit your own personal preferences and writing style. We have included sample wording for the 'KiwiSaver Top-Up Reminder' email at the end of this document which we will use when setting the automation up.

Please let us have details of any changes you would like to make to the standard wording.

Top-up amount required

For this automation to be as effective as possible it is designed to include the actual amount the client needs to 'top-up' to maximise their government contribution. This information will need to be supplied by the relevant provider, and is usually supplied in CSV format which we will import into Active Campaign.

Please let us know the provider(s) you use for KiwiSaver so that we can ensure they can supply us with the relevant data.

If the actual top-up amount cannot be supplied, we can modify the email to provide general instructions for top-up but without the amount required, if appropriate. We will discuss this option with you if we are unable to get access to the required top-up data from any of your KiwiSaver providers.

Sample Wording

We have provided below some sample wording you may wish to consider for the email used as part of this automation. Please let us have details of any changes you would like to make to the sample wording.

Kiwisaver Top-Up Reminder Email

Dear [[First Name]]

Just a reminder that if you want to qualify for the maximum Government Kiwisaver Top Up you will need to top your Kiwisaver account up by [[Top-up amount required]] by the 30th of June.

The best way to do this is through Bill Payments in your internet banking.

Enter [[Provider]] as the payee and their bank details should be entered automatically.

You will need to put in your policy number [[Member or Policy Number]] and your IRD number [[IRD Number]]

If you have any questions, please don't hesitate to reply to this email or give us a call on [[Contact Number]].

Cheers

[[Advisor Name]]