



FINANCIAL ADVISORS

Business Development Service

Email Automation Process Flow

for

Policy Renewal Reminders

Introduction

The policy renewal reminder automation is designed to send a personalised email to each client just before they receive their provider policy renewal documentation, to ensure that each client remembers they are dealing with you rather than the provider, and encouraging them to contact you if they have any questions, comments or concerns in relation to the renewal documentation.

The automation includes automated reminders if they client does not open the emails. The renewal reminder emails can also contain links allowing them to book a meeting with you, if appropriate.

Required Data

The following data is required for this automation to work:

- First Name
- Email Address
- The following data is required for EVERY policy the client has with you:
 - Provider
 - Policy Name
 - Policy Number
 - Policy Renewal Date (in dd/mm/yyyy format. Active Campaign will ignore the year and send on the same date every year)

Process Flow

1. The automation will be triggered 7 days before each policy renewal date.
2. When the automation starts a 'policy renewal reminder' email will be sent to the contact's email address.
3. The automation will wait for 4 days
4. The automation will check to see if the contact has opened the policy renewal reminder email.
5. If the contact has opened the email the automation will end.
6. If the contact has not opened the email, the 'policy renewal 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 policy renewal reminder process for all clients and all individual policies. Only clients in the 'Policy Reminder' List will receive these reminders – to stop clients receiving all reminders just remove them from the Policy Reminder List. To stop clients receiving reminders for specific policies just delete the renewal date for that policy.

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

Clients with multiple policies

As clients will receive a policy renewal reminder email for every policy they have with you, care should be taken with clients who have multiple policies, especially if a number of policies come up for renewal on the same date, or dates close to each other.

The automation can be modified to prevent the sending of multiple policy renewal reminder emails on the same date – please contact us if you would like this feature to be implemented.

Calendly meeting links

You may wish to offer a policy review meeting to clients as part of the policy renewal reminder email. A Calendly link to a specific Policy Review Meeting can be included in the email. You will obviously have need to have provided details for the Policy Review Meeting as part of the Calendly set up process.

The Policy Review Meeting Calendly booking link can be included for all policies, or just for specific policies or providers.

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 'policy renewal 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.

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.

Policy Renewal Reminder Email

Dear [[First Name]]

I'm just writing to let you know that your [[Policy Name]] policy with [[Provider]] is due to renew on [[Policy Renewal Date]].

You should receive your new policy documentation from [[Provider]] in the post within the next week or so. Please take the time to review the policy documentation and carefully follow the instructions provided, to ensure that your cover continues. Don't hesitate to let me know if you have any questions or if you'd like to get together to discuss in more detail.

Feel free to reply to this email, or give me a call on [[Advisor Phone Number]].

Cheers

[[Advisor Name]]