



# Marketing Checklist:

## Property/Casualty & Life/Health

Best's Rating Reports can help boost your marketing and public relations efforts. Use the following checklist to calculate the quantity you will order based on your particular needs.

### SALES DEVELOPMENT

*Agency Managers—Agents—Special Agents—Representatives*

- Presentations and proposals ..... \_\_\_\_\_
- New policy enclosure ..... \_\_\_\_\_
- Agent orientation, enclose with new agent licenses ..... \_\_\_\_\_
- Agents of affiliate companies ..... \_\_\_\_\_
- Stockbrokers for customer use ..... \_\_\_\_\_
- Sales kit enclosure ..... \_\_\_\_\_
- Direct mail promotion ..... \_\_\_\_\_
- Correspondence enclosure ..... \_\_\_\_\_
- Advertising coupon offer ..... \_\_\_\_\_
- Trade show displays ..... \_\_\_\_\_
- Recruiting tool ..... \_\_\_\_\_

**QUANTITY**

### CORPORATE RELATIONS

*Policyholders—Stockholders*

- Premium/dividend inserts ..... \_\_\_\_\_
- Policyholders' service program ..... \_\_\_\_\_
- Quarterly/semiannual report enclosure ..... \_\_\_\_\_
- Correspondence ..... \_\_\_\_\_
- Conservation program ..... \_\_\_\_\_

### CREDIT

- Banks ..... \_\_\_\_\_
- Savings and loan associations ..... \_\_\_\_\_
- Mortgage companies ..... \_\_\_\_\_
- Finance companies ..... \_\_\_\_\_

### BROKERAGE

- Brokerage sales presentations ..... \_\_\_\_\_

### PUBLIC RELATIONS

- House publication insert ..... \_\_\_\_\_
- Financial editors of local newspapers ..... \_\_\_\_\_
- Press kits, press releases ..... \_\_\_\_\_
- Reception areas, literature display racks ..... \_\_\_\_\_
- Realtors ..... \_\_\_\_\_
- Local governments ..... \_\_\_\_\_
- Corporate leaders ..... \_\_\_\_\_
- Service organizations ..... \_\_\_\_\_
- Attorneys, accountants, adjusters ..... \_\_\_\_\_
- Agents and brokers ..... \_\_\_\_\_
- School boards ..... \_\_\_\_\_

### EMPLOYEE RELATIONS

- Human Resources department for new employees ..... \_\_\_\_\_
- Newsletter insert ..... \_\_\_\_\_
- Literature racks ..... \_\_\_\_\_

To order a Best's Rating Report, call (908) 439-2200, ext. 5117.

