



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/semi-annual 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 _____

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