



Southwest Region Corporate Relations 2013 Independent Agency Communications Plan

Situation Analysis

Allstate's Southwest Region is rebuilding its relationship with independent agencies. The IAs are largely unaware of Allstate's processes, discounts, products and marketing initiatives.

In order to rebuild our partnerships, Customer Service Representatives need direct communication from Allstate. They want direct support by calling specific people to address their questions.

To help address CSRs concerns and to provide education, marketing and product communication, the Southwest Region Corporate Relations team aims to provide Independent Agencies with a creative, concise and consistent communication through the following plan.

Goals

- Improve our IA relationships through consistent, concise, fun and informative communication that includes Allstate resources, education, incentives and processes.
- Ensure all communication falls within global themes of pricing, quote accuracy, speed and point of contact.
- Provide opportunities to increase business through engagement contests, promotions and incentives.

Objectives

- Increase AIA engagement to 47 agents from 22 (18 percent) by end of 2013.
- Meet yearly AIA regional production goals (currently -19.5% to plan in standard auto; -10.6% in casualty).
- Increase daily AIA serious quote volume by 25 percent.
- Leverage biweekly emails to communicate with 90 percent of our independent agency partners

Target Audiences

- Allstate Independent Agency Principals
- Allstate Independent Agency Customer Sales Representatives and other support staff
- Allstate regional employees (for content, information, point of contact)

Tactic 1: Biweekly Communication to Independent Agency CSRs

- Launch biweekly email campaign on Thursdays highlighting product, marketing and education updates, regional resources and sales processes to connect with independent agency CSRs.
 - Ensure our highest priority messages are effective, concise and communicated consistently.
 - Repurpose content from AIA national Newsletter, AIA newsletter templates and localized regional content from SW Express submissions, amended to support IAs.
 - Create contact section with headshots and contact information allowing departments to personalize content.
 - Include button to invite staff, new hires and to forward email to staff

- Create ongoing email survey/feedback system to improve IA communication
- Create sections broken out by purpose (marketing, education, product) and organize by category (personal lines, commercial, etc.)

Tactic 2: Monthly Incentive and Business Promotion Emails

- Create monthly emails sent directly to agency principals regarding business information and updates to incentives, promotions and process changes.
 - Solicit approval on promotions and incentives before communication to staff.
 - Content generated from Tom Smith, MAPS and IA sales team
 - Create a user-friendly forwarding system so principals can easily relay approved messaging to staff
 - Create ongoing email survey/feedback system to improve IA communication

Tactic 3: Regional AIA Advisory Board

- Launch regional advisory board, serving as a communication liaison between the board, company and other independent agencies throughout the Southwest Region.
 - Utilize feedback loop to enhance AIA/region relationship and grow business.

Timeline

DEADLINE	ACTION	STATUS
10-Jul	St. George, Utah focus group to learn about IA principals and CSRs wants, needs and about their workflow	Complete
July	Build CSR email distribution list. 1. Create easy way to send contact information (Google Form) 2. Create email for Cecilia Spencer to distribute to our existing IA list to solicit CSR contact information. 3. Follow up to any feedback to build relationships 4. Follow up to no responses	Complete
26-Jul	Create communication plan draft, present to Melinda and Tom by Aug 2.	Complete
26-Jul	Create template for biweekly IA communication.	Complete
Aug. 1	Create newsletter graphics: Forwarding email to coworkers, sign up form, feedback, etc.	
Aug 1	Create titles for newsletters and global messages: pricing, quote speed/accuracy and contact	
Aug 1	Present video update idea to Tom, including secret word contest to drive engagement	

Aug 2	Create ongoing SurveyMonkey survey to measure feedback (similar to communication audits)	
2-Aug	Work with Alison/SW Express contributors to add IA to SW Express submission form. Ensure content is submitted with SW Express deadline.	
8-Aug	Distribute first Tom Thursday email free of Allstate acronyms!	

Budget

- \$25 gift card every newsletter to drive engagement: x 20 weeks for the rest of the year (\$500)
- Various collateral for contests, marketing promotion and engagement
 - (\$3,000 for physical collateral and \$1,500 for TBD engagement-related contests)
- Total budget request: \$5,000 for remainder of 2013

Measurement and Analysis

- Utilize Constant Contact analytics (open rate, clicks) and supplement with Hootsuite links
- Leverage ongoing SurveyMonkey survey data to measure feedback on effectiveness, quality of content, etc.
- Measure monthly quote accuracy to determine if communication/relationships are resulting in increased sales and accuracy, as well as applied discounts.
- Measure IA sales to determine if communication/relationships are directly tied to increased Allstate policies written.