



ASSOCIATION MARKETING

# ASSOCIATION MARKETING BROKERAGE PROPOSAL REQUEST

Name of Association \_\_\_\_\_

This form supplies Association Marketing with the information necessary to determine the marketability and quality of the association to be offered coverage. The more information submitted, the faster the decision can be made whether to accept the association. Additional information may be requested to expedite the decision.

## GUIDELINES FOR ASSOCIATION ELIGIBILITY:

1. What determines "Affinity" or "Non-Affinity" Classification.

### Affinity

- Association whose individual members have common or related occupations; and those occupations are 1A, 2A, or 3A.
- Associations of member firms, where eligible member is clearly defined.  
(Example - Chamber of Commerce.)

### Non-Affinity

- Multi-occupational associations.
- Association whose members' occupations are "4A" and above.

2. Local associations must consist of at least 150 dues-paying members. State associations must consist of at least 250 dues-paying members. National Associations must consist of at least 1,000 dues-paying members.

3. An organization is probably a true association and may qualify for Association affinity coverages if it has: (a) been in existence two or more years; (b) bylaws, officers; and (c) annual dues-paying members who vote on officers and matters of policy.

4. Associations or organizations with any of the following concerns are examples of associations or organizations that will NOT be eligible for association affinity coverage:

- a. has no affinity,
- b. lacks reliable membership records,
- c. formed for the purpose of obtaining insurance,
- d. formed to promote political views,
- e. formed purely for social purposes,
- f. formed for commercial venture,
- g. has hazardous occupations.

Some examples of associations that would not qualify include, but are not limited to: health spa, buying club, contracted service organization, hobby association, and fraternal organizations.

If in doubt, we will be glad to review an association for association affinity coverage.

5. Because of Employer Benefit Laws, employees of members are not eligible for Mutual of Omaha Companies Affinity coverages.

6. All applications are individually underwritten according to MPG guidelines.

7. Broker is permitted exclusive rights.

**ASSOCIATION MARKETING REQUIREMENTS:**

1. This form must be approved by the Home Office before any formal presentation is made to an association.
2. Attach a copy of the association's bylaws.
3. All promotional expenses are the responsibility of the Broker and all written material, including letters, phone scripts, advertising and presentations, must receive prior approval from the Home Office Advertising Committee. Allow a minimum of 2-3 weeks for approval.
4. A total of 25 applications must be received in the Home Office in 6 months. If this requirement is not met, the file will be closed to new business.

Direct the Proposal Request and Bylaws to your Senior Marketing Analyst. All questions should also be directed to your Senior Marketing Analyst at 1-800-624-5554.

Material may be sent via **FAX (402) 351-5829**.

**MATT MCCOY X2369**

AK-AZ-AR-CA-CO-HI-ID-IA-IL-KS-LA-  
MI-MN-MO-MT-NE-NV-NM-NY-ND-  
OK-OR-SD-UT-WA-WI-WY

**COLLEEN STOLZ X2883**

AL-CT-DC-DE-FL-GA-IN-KY-ME-MD-MA-  
MS-NH-NJ-NC-OH-PA-PR-RI-SC-TN-TX-  
VT-VA-WV

Association Name \_\_\_\_\_

Address \_\_\_\_\_  
Street City State Zip Phone

Principal Contact \_\_\_\_\_ Title \_\_\_\_\_

Type of Organization:  National  State  Local  Multi-state \_\_\_\_\_  
(List States)

Occupation:  Common  Multi

Occ. Class:  1A  2A  3A  4A  5A

Number of Members \_\_\_\_\_ Average Income Range \$ \_\_\_\_\_

Date Association Organized \_\_\_\_\_ Annual Dues \$ \_\_\_\_\_

Bylaws Attached (Mandatory):  Yes

Demographics Attached:  Yes  No

Coverages Wanted:  Major Medical/Major Hospital  Long-Term Care  
 Cancer  Medicare Supplement  
 Critical Illness

Communication with Members:  Magazine  Newsletter  Meetings Frequency: \_\_\_\_\_

If approved, number of proposals needed \_\_\_\_\_

Date proposals needed (please allow at least two weeks) \_\_\_\_\_

Broker Signature \_\_\_\_\_

Broker Name (Please Print) \_\_\_\_\_

Address and Phone Number \_\_\_\_\_

**MARKETING PLAN FOR:** \_\_\_\_\_

**\*Successful implementation of marketing to associations requires advance planning. Your proposal request will be considered based on your marketing plan for this association. Also, successful implementation of your marketing plan impacts future consideration of other proposal requests. If more room is needed, please attach a second sheet.**

Sales Objectives:

This year \_\_\_\_\_ Next year \_\_\_\_\_

Number of contacts planned per week \_\_\_\_\_

Suggested Marketing Approaches:

- |                |                       |
|----------------|-----------------------|
| Direct Mail    | Telephone Approach    |
| Mass Mail      | Face-to-Face Approach |
| Giveaway Offer | Referrals             |
| Brochure       | Centers of Influence  |
| Advertising    | Networking            |
| Seminars       |                       |

How do you plan to market to this association? If you are using telephone approach, please attach a sample telephone track. (See Phone Talk Basic Approaches - MC24157)

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What kind of follow-up will be made to the above approach?

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Success in Association Marketing requires involvement in association activities. How do you plan to become well known and visible with the association members?

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What support do you need from agency and/or Home Office management?

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How will your efforts be monitored?

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\_\_\_\_\_  
Broker Name

\_\_\_\_\_  
Firm

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone Number

## ASSOCIATION MARKETING SUPPORT

Personal service to association executives and members is the key to securing and retaining endorsements. Association Marketing is committed to providing the tools you need to work existing associations and secure new endorsements.

AM support available (at your cost) includes:

- letters
- customized flyers
- ads
- posters

## ASSOCIATION MAILINGS

Association Marketing provides approved letters that will help you reach association executives and members. These letters may be printed on association letterhead and mailed to all association members, **at your cost**. The steps for processing a mailing from Mutual of Omaha are as follows:

- Receive membership roster
- Determine if you wish to use a flyer and which pre-approach or endorsement letter you wish to use. If you choose to send your own letter, it first **must be approved** by Mutual of Omaha. Please allow 2-3 weeks for approval.
- After you choose the appropriate letter, you will need to obtain:
  - three sample copies of the association's carrier envelope
  - three sample copies of the association's letterhead
  - three copies of the signature of the association executive or agent who will sign the letter
- Arrange to have materials printed, either by the Home Office or locally. Your Senior Marketing Analyst can provide Mutual of Omaha printing cost estimates. If materials are printed locally, please submit printed copies to Mutual of Omaha for approval and for file.
- Mail materials, at your expense, from either your office or Mutual of Omaha.

## CUSTOMIZED FLYERS

Association flyers are designed to be customized with the association's name. The reply card on the flyer can be overprinted with your office address. These flyers, when distributed to association members, demonstrate your commitment to the association. Printing cost estimates can be obtained by contacting your Senior Marketing Analyst.

## ADVERTISEMENTS

Ads are available for placement in an endorsing association's magazine, newsletter, etc. Each ad will be personalized to include your office telephone number and contact name. To order, contact your Senior Marketing Analyst. Information that will be needed for your request are:

- ad size width x length
- association name
- products to advertise
- publication due date
- address of where to ship ad

\* **Please ask for price estimates prior to ordering.**

## **POSTERS**

Posters are available to display in association offices, teacher lounges, etc., anywhere association members gather. These can be overprinted with an agent or office name, address and phone number. These posters remind members of the availability of an insurance program and tells them who to contact if they are interested. Contact your Senior Marketing Analyst for more information.

Direct all questions to your Senior Marketing Analyst at **1-800-624-5554** or via **FAX (402) 351-5829**.

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