



Strategic alliance business marketing campaign

Use this step-by-step campaign to help market your solutions to a strategic alliance's business clients.

1. Make the introduction.

Send an email introducing the dedicated staff person who'll be providing these additional financial solutions.

Resources:

- **Business Client Approach Email (LF337)**

Note: You can edit all email files to include the strategic alliance's logo and customize the next steps/calls to action. Don't suggest in the email that you'll follow up with a phone call, unless you plan to at this stage.

[View](#) (OFT)

2. Follow up with select business clients.

Reach back out to business clients who meet the criteria outlined in [this guide](#).

Resources:

- **Importance of Reviewing a Buy-Sell Agreement Email (LF502)**

[View](#) (OFT)

3. Arrange a formal introduction at a client annual meeting.

The best way to make a face-to-face introduction to business clients is for the strategic alliance representative to invite you to the last 15-20 minutes of an annual meeting or formally introduce you via a teleconference.

Resources:

- **Business Planning Services Approach Letter (BB10245)**
Send this letter when helping set up the client's annual meeting. The text can be copied and pasted into an email, if desired. Always put this on the firm's letterhead.
[View](#) (DOC)

4. Continue a dialogue with clients who meet the criteria outlined in Step 2.

After you've made a personal introduction, make follow-up phone calls and send a series of emails that continue highlighting the value of the solutions you offer.

Resources:

- **Business Planning Services RFP**
Use this digital RFP to collect information from clients and submit a request.
[View](#)
- **Importance of an Accurate Business Value Email (LF724)**
[View](#) (OFT)

5. Request/present proposals and submit business.

Follow [this process](#) to request proposals, present them (with support from the Business and Advanced Solutions team at Principal®), and submit the business.

6. Follow up with clients who don't meet the criteria outlined in Step 2.

Consider approaching these clients about one of the following topics — business protection/key person insurance or use the digital [Principal Business Needs Assessment](#). We've seen success with both approaches.

Resources — Business protection/Key person insurance:

- **Key Person email template (LF1646)**
[View](#) (OFT)
- **Business Protection Decision Grid (BB11280)**
[View](#) (PDF)

- **Key Person Calculator**
[View](#)
- **Key Employee Sample Output for Owners – life insurance (BB10466A)**
[View](#) (PDF)
- **Key Employee Sample Output for Non-Owners – life insurance (BB10466B)** [View](#) (PDF)
- **Key Employee Sample Output for Owners – disability insurance (BB10466C)** [View](#) (PDF)
- **Key Employee Sample Output for Non-Owners – disability insurance (BB10466D)** [View](#) (PDF)
- **Key Employee Sample Output for Owners – life and disability insurance (BB10466E)** [View](#) (PDF)
- **Key Employee Sample Output for Non-Owners – life and disability insurance (BB10466F)** [View](#) (PDF)

Resources — Prioritizing business needs:

- Step 1: Setting the appointment
 - **Prioritizing Business Needs Approach Letter (BB10882)**
[View](#) (DOC)
 - **Prioritizing Business Needs Approach Email (LF519)**
[View](#) (OFT)
- Step 2: Initial consultation
 - **Business Owner Priority Checklist (BB9557)** [View](#) (PDF)
 - **Business Life Cycle and Planning Brochure (BB11226)**
[View](#) (PDF)
- Step 3: Offering solutions
 - **Business Solutions Chart (BB10565)**
[View](#) (PDF)

Not sure which solutions best fit the situation? These tools can help determine solutions for the business:

- **Business Protection Decision Grid (BB11280)**
[View](#) (PDF)
- **Business Succession Decision Grid (BB10262)**
[View](#) (PDF)
- **Key Employee Retention and Retirement Decision Grids: [For C Corps](#) (BB11384) (PDF) | [For S Corps/LLCs](#) (BB11383) (PDF) | [For Tax-Exempt Entities](#) (BB11385) (PDF)**

Determine solutions for the business owner's lifestyle:

- **Business Owner Retirement Analysis (BB11876)**
[View](#) (PDF)
 - **Business Owner Retirement RFP (BB11879)**
[View](#) (PDF)
 - **Estate Tax Calculator (BB10045B)**
[View](#) (PDF)
 - [Life Insurance Calculator](#)
 - [Disability Insurance Calculator](#)
- **Step 4: Requesting proposals**
After narrowing down the options, [request a proposal](#) for the specific solution that meets the needs of your client.

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