

Association Marketing Partnership

Association

- Advertise the program on your website. Let your members know that this is an enhanced benefit for **members only** and this is also one more reason for them to join or maintain their membership.
- Advertise the program in your monthly newsletter. Keep the information in front of the members.
- Display the contact information of the endorsed agent. This will help to direct the calls to the agent instead of to the Association.
- Be sure to send your endorsed agent a monthly “New Members” listing.
- Supply your endorsed agent with your Associations membership (including contact person and telephone #) list so that they can personally contact the members. Be sure to specify to the endorsed agent the best means of communication to your members.
- Hold your endorsed agent accountable. Have he/she to provide you with a monthly report / spreadsheet of the members they have contacted and a brief comment about their discussion. See example below.

Org. Name	Last Name	First Name	Telephone	Date Called	Fax/Email	VM / Message	Comments
ABC Company	Davis	Sherry	(757) 555-1232	1/2016		Voicemail	Very interested
DEF Company	Anderson	Dave	(540) 555-1212	Out of area			
GHI Company	Davies	Sarah	(804) 555-1422	1/2016	Email		Contact grp. again next month

Endorsed Agent

- Personally call each new/existing member, introduce yourself and talk about the program. Offer to fax the member some information. Emailing them should be secondary, unless they request it.
- Consider doing your own personal mailer to the members. That way you can display and promote other products you have to offer. This could potentially increase your book of business.
- Stay in close contact with the Association and stay abreast of their upcoming events.
- Offer to sponsor one of the events that the Association offers.
- Attend as many of the Associations events that you can. Try to stay in front of the members.

Optima Health Marketing Representative

- Attend upcoming events. Rep will be available to attend events with a vendor display, marketing materials and giveaways. The endorsed agents are always welcome to attend events.
- Keep the Association informed on how the program is progressing via monthly or quarterly reports.
- Keep the Association updated on benefit changes and current marketing collateral.
- Provide the Association and the broker with any assistance they may need.