

Protective Life: Many firms offer value-add programs to their advisor clients. But Protective Life wanted to demonstrate that they back up their program as if it were one of their own policies. How? By delivering on their promise to develop programs that enhance their advisor clients' practices. For a little extra "insurance," Protective turned to s2 for a comprehensive program of educational materials and content on the issues surrounding key retirement decisions.

Challenge

Protective Life asked s2 to assist them in constructing and delivering a program that was to be developed around "Understanding Social Security." The program was intended to position their wholesalers in a more consultative and supportive light with their advisor clients and provide content of value for the advisors to use with their own clients. s2 was also asked to develop valuable tools that would help the advisors build their businesses through prospecting and by promoting the need for retirement income planning services. Chief among these tools was to be an interactive online tool for use by advisors during client meetings.

s2 Response

The multimedia program s2 developed provides advisors with the competitive advantage Protective originally envisioned. It offers them the tools to master the intricacies of the Social Security program, along with the collateral and online support needed to help explain the government program to their clients and to use that expertise in prospecting efforts.

With educational brochures written for use by both clients and advisors, along with pre-packaged seminar presentations—from invitations and a presentation script to workbooks and annual check-up mailers—s2 wrote and designed all of the collateral needed to support Protective's comprehensive program on Social Security. s2 then developed the content for and designed an online education hub, which includes an interactive planning tool for use by advisors during their client meetings.

Results

In the first two months after the program's soft launch, it was promoted to about 14,000 advisors through e-blasts and presentations at industry conferences where it drew standing-room-only crowds. Visitors to the dedicated microsite averaged 2-3 minutes on the site. But more significantly, 40 percent were return visitors. For further indication that advisors found the program useful, Protective's wholesalers reported a steady stream of requests for help in presenting client seminars on the topic with the s2-created material.



Preparing for Retirement with Individual Strategies & Methods



Microsite



An Advisor's Guide to Understanding Social Security



A Consumer's Guide to Understanding Social Security

Advisor brochure

Client brochure



Prospecting mailers