Setting up and executing an email marketing campaign is one of the most exciting projects a marketer can take on. It entails figuring out the right subject line, how to deliver the best digital experience, and sorting through the data and digital activity that we are able to capture as marketers.

As discussed in our white paper, “Warning! One Size Does Not Fit All: Email Marketing to Millennials,” a wealth of willfully provided data is usually at your disposal when communicating with Millennials. However, these consumers expect something in return for their data - dynamic, personalized content that's relevant to them.

In this document, we’ll provide you with an example email playbook for our hypothetical insurance company from the white paper, Total Insurance, determining its customer audience, insights, and offerings.

Using the included template, you can fill out your own playbook to answer these preliminary questions about your strategy. They will serve as the foundation of your email campaign, provide focus for your email communication stream, and keep you on target with your message.

Happy emailing!
<table>
<thead>
<tr>
<th>Email Topic</th>
<th>Value of taking action</th>
<th>Call to Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Homeowners/Renters Insurance</td>
<td>Help me with the transition</td>
<td>Help me with the transition</td>
</tr>
<tr>
<td>My Customer:</td>
<td>Making some changes?</td>
<td>Making some changes?</td>
</tr>
<tr>
<td>My Insight:</td>
<td>Need to talk to an expert?</td>
<td>Need to talk to an expert?</td>
</tr>
<tr>
<td>My Distinct Offering:</td>
<td>What's next?</td>
<td>What's next?</td>
</tr>
</tbody>
</table>

**Email Topic:**

- **Homeowners/Renters Insurance**
- **Making some changes?**
- **Help me with the transition**
- **Need to talk to an expert?**
- **What's next?**

**Call to Action:**

- **Help me with the transition**
- **Get My Free Consultation**
- **Schedule an Appointment Now**
- **Connect Me with an Expert!**
- **Expert Help with the Transition**
- **Get an expert on board**
- **Get more information on your home investment**
- **Need to talk to an expert?**
- **What's next?**

**Value of taking action:**

- **Connect Me with an Expert!**
- **Get My Free Consultation**
- **Schedule an Appointment Now**
- **Get expert advice on your home investment**
- **Need more information on your home investment**
- **Need to talk to an expert?**
- **What's next?**

**Your policy:**

- **You make changes to your policy**
- **Have an expert help you**

**Service Representative:**

- **Get specific advice on your policy from a service representative**
- **Focus on expert advice rather than general educational content; materialistic imagery (houses, furniture, electronics, etc.)**

**Understanding differences:**

- **Connect Me with an Expert!**
- **Get expert help with the transition**
- **Get expert advice on your home investment**
- **Need to talk to an expert?**
- **What's next?**

**Newly married/first-time homeowner Millennials**

- **Insure a home for the first time?**
- **Need more information based on your particular circumstances?**
- **Making some changes?**
- **Need expert help with your policy?**

**Total Insurance Email Playbook, Page 2**
Life insurance

Consolidate My Insurance

Refer-a-Friend

Share My Story

Value of taking action

What's Everyone Else Doing?

Encourage conversation among peers and

Millennials starting a family

Might enjoy family imagery, children, loved ones, etc.

Email Topic

Call to Action

Consolidate bills and reduce costs by using the same insurance provider.

Receive a discount on your policy for making a qualified referral.

Start a conversation with and receive sought–after recognition from peers.

Learn through statistics/demographics what type of policy makes the most sense.

Are all your bases covered?

How did we help you plan for your family's future?

Help out a friend, and reward yourself!

Encourage conversation among peers.

My Insight

My Customer

What's everyone else doing?

What does everyone else love?

Protecting those you love and family:

Talk to your friends and family about protecting those you love.

Share My Story

Refer a Friend

Consolidate My Insurance

Call to Action

Value of taking action

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