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Executive Summary

The following is a strategic campaign designed for Carol Duncan-Smith, a New York Life insurance agent.

The goal of the campaign is to increase awareness of Carol Duncan-Smith and her services as an insurance agent for New York Life in the Grand Rapids, Michigan area. Specifically, to increase her social media following and the number of young family clients she works with. Our team has developed a campaign to accomplish these goals by the end of 2018.

Included in this campaign is the framework necessary to successfully become a sponsor for a local event, which will expose more young families to your business. There are also steps in this campaign that will encourage an increased reach when it comes to social media, as well as ways to grow followings on each individual platform. Also included is recommended points of evaluation, to use before and after the campaign is executed, to judge the campaign's success and how it changed the way your business interacts with and reaches clients.

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Situation Analysis

Carol Duncan-Smith is a financial advisor with New York Life located in Grand Rapids, Michigan. She has very limited reach on Facebook and is not currently on any other social media platform.

Grand Rapids is considered one of the best cities for young families as stated by Value Penguin. Statistics back up this claim as the median age of the city is 31. This implies that there are many young adults in the area who would be looking for life insurance, homeowners' insurance, or saving money for their child's college fund.

Carol Duncan-Smith's Facebook page is full of useful information for people planning their retirement and who have questions about insurance. There are only 31 people who follow this page. None of these 31 people seem to interact with the posts. It is difficult to determine the present reach without insider access to the page.

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Primary Research

- To find how much it would cost to re-print new business cards that include your Facebook information, we used Vistaprint.
 - https://www.vistaprint.com/business-cards/standard?project_id=e41e165e-1fa4-4438-bf2c-5d87e6e5f1fb
- All information on the Grand Rapids Civic Theater and various sponsorships/ads was found through the GRCT website:
 - <http://www.grct.org/>
- Creating and budgeting for a custom snapchat filter was done through the Snapchat website at:
 - <https://www.snapchat.com/create>
- A positioning statement for the company was found on the New York Life Website.
 - <https://www.newyorklife.com/about/our-strength/>
- Information about the Grand Rapids area demographics were found on these websites:
 - <https://www.valuepenguin.com/2016/best-cities-young-families>
 - <https://suburbanstats.org/population/michigan/how-many-people-live-in-grand-rapids>
- The Facebook Ad pricing and Information layout was researched here:
 - <https://www.facebook.com/ads/manage/powereditor/>
- Press Release 1960-70s effort to revitalize downtown
 - <http://www.rapidgrowthmedia.com/features/buildinggrandrapidspart2.aspx>
- Press Release Millennial home buying
 - http://www.mlive.com/business/west-michigan/index.ssf/2017/12/thanks_to_millennials_grand_ra.html

Target Audience

- Small growing families
- Grand Rapids, Michigan
- Parents ages 25-45
- Married/engaged with children
- College graduated BA
- Cool, young, hip



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SWOT Analysis

Strengths	Weakness	Opportunity	Threats
Target market allows for perfect exposure/awareness of the insurance buying options benefiting younger people.	Very few followers on Facebook, little to no interaction on social media. Ensure links shared on Facebook work. Currently no reviews on Facebook page.	Introduce and raise awareness for FB. Guaranteed 10k or more views with Spotlight Sponsorship (Rehearsal) Package.	Other insurance agencies that target young families and may have younger professionals.
Flex plans are appealing to the younger generation (Millennials/ Generation Y) who work to live.	Very few young families as clients (lots of posts on social media about retirement when trying to attract a younger audience.)	Having brand associated with a fun family event, a chance to connect with young families (and turn those connections into social media follows).	Younger generations not knowing or not viewing investing the same way older generations have.
Carol is trustworthy, genuine, and specializes in education funding, so children's events will attract targeted customers.	Facial recognition-is Carol known around the area?	Connect with groups who recommend things to young families (mom and parent blogs). Young audience, average age in Grand Rapids is 31.	Brands with more name recognition and more of a presence on social media.

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Goal

To increase the awareness in the Grand Rapids, Michigan area of Carol Duncan-Smith and her services as an insurance agent for New York Life.

Objectives

- Increase the number of clients with young families by 5 before the end of 2018.
- Increase number of Facebook Followers to 100 or more by the end of 2018.
- Create and Utilize Twitter to gain 50 followers by the end of 2018.

Positioning Statements

From the New York Life Website:

- “We built our business to endure. Since 1845, we’ve kept the promises we made to protect our policy owners and their beneficiaries. We’ve been able to stand by them, because each promise is backed by stability and proven financial strength.”
- “Depression-proof. Recession-proof. History-making.”

Creative Strategy

New York Life is an adaptive and beneficial way to confidently build your family knowing your loved ones are insured for life. From flexible plans to buying insurance for the young, New York life promises multiple ways to make sure your growing family is safe and covered.

Jeff (30) and Kim (34) have a young and growing family with a son Jackson (8). Jeff and Kim have their own gym where they hold training sessions from Pilates to weightlifting. Jackson loves to play outdoors and watch movies.

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This weekend Jeff and Kim are planning to take Jackson to go see *Shrek the Musical* at the Grand Rapids Civic Theatre. They love taking Jackson to different plays because it's better than him sitting in front of a screen. Since Jeff and Kim are familiar with the Grand Rapids Civic Theatre, they were exposed to the New York Life when they used the Snapchat filter to record Jackson's reaction when Donkey came on stage.

During the 2018-2019 season, Jeff and Kim saw the Playbill ad during the performance and are currently in contact with an outstanding NYL representative, Carol Duncan-Smith! Jackson is growing and with thoughts of another on the way Kim and Jeff really want to buckle down and make sure their family has a solid foundation. With Carol's help through the confusing process of buying life insurance, Jeff, Kim and Jackson are now comfortably insured for life.

Creative Executions (tactics)

Business Cards

As discussed when we spoke with you, adding your social media profiles to your business cards is a simple way to increase traffic on your pages. Social media is a way for potential clients to connect with you, even before they are ready to reach out and begin searching for the insurance that is right for them.

For just **\$20**, you can print 500 new business cards from vistaprint.com, and begin promoting your Facebook and Twitter accounts with no extra effort on your part.

Video

The video is a 30 seconds promotion for Carol Duncan-Smith and will be a part of the Social Advertising section.

The focus of the video is a young couple who are only shown by hands and feet as we wanted the audience to see themselves in the clip. The voiceover is provided by Natalie Pistone.

Press Release

For Immediate Release

For more information contact:

Carol Duncan-Smith, New York Life Agent

Phone: (616) 204-3213

Address: 333 Bridge Street, Suite 600, Grand Rapids, MI 49504-5365

Email: cduncansmit@ft.newyorklife.com

Grand Rapids Civic Theatre vital part of 1960s-70s efforts to revitalize downtown

Grand Rapids Civic Theatre wants to remain part of bring the city together

Grand Rapids, MI – March 6, 2018 – Carol Duncan-Smith, local New York Life agent, is announcing a partnership with the Grand Rapids Civic Theatre in efforts to strengthen family ties this year. As part of the 2018-2019 season, the two companies will partner in the showing of “Shrek: The Musical”. Both sides of the partnership look forward to giving local families a fun way to spend quality time.

Carol Duncan-Smith, an agent for New York Life, is excited to be a part of this partnership. Carol emphasizes funding for young children and specializes in families that are still growing. With Carol's help, families feel confident in their ability to secure a future for their children and future children.

The Grand Rapids Civic Theatre has been a wonderful place for families to bring their kids for years. From June 1 – 17, the showing of “Shrek: The Musical” at the Grand Rapids Civic Theatre will provide the local community with needed summer entertainment. The Grand Rapids Civic Theatre represents the heart of the city.

Grand Rapids was listed first in “millennial home buying” by Trulia in the month of April 2017. Dave VanKeulen, a real estate agent in the Grand Rapids area said, “It's been a wonderful year for young families...millennials purchasing homes is a very real part of my business”. With a growing young economy, New York Life and the Grand Rapids Civic Theatre look once again, to be an intricate part of a growing Grand Rapids city.

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About New York Life:

New York Life Insurance Company, a Fortune 100 company founded in 1845, is the largest mutual life insurance company in the United States* and one of the largest life insurers in the world. New York Life has the highest possible financial strength ratings currently awarded to any life insurer from all four of the major credit rating agencies: A.M. Best (A++), Fitch (AAA), Moody's Investors Service (Aaa), Standard & Poor's (AA+).** Headquartered in New York City, New York Life's family of companies offers life insurance, retirement income, investments and long-term care insurance. New York Life Investments*** provides institutional asset management. Other New York Life affiliates provide an array of securities products and services, as well as retail mutual funds. Please visit New York Life's website at www.newyorklife.com for more information.

*Based on revenue as reported by "Fortune 500 ranked within Industries, Insurance: Life, Health (Mutual)," *Fortune* magazine, 6/12/17. For methodology, please see <http://fortune.com/fortune500/>.

**Individual independent rating agency commentary as of 8/1/17.

***New York Life Investments is a service mark used by New York Life Investment Management Holdings LLC and its subsidiary, New York Life Investment Management LLC.

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Social Advertising, Snapchat filter for Event

Facebook Social Advertising is a way for pages and brands to promote themselves to Facebook audiences through targeted ads and boosted posts.

Using Facebook Ads Manager, the following target demographic was created:

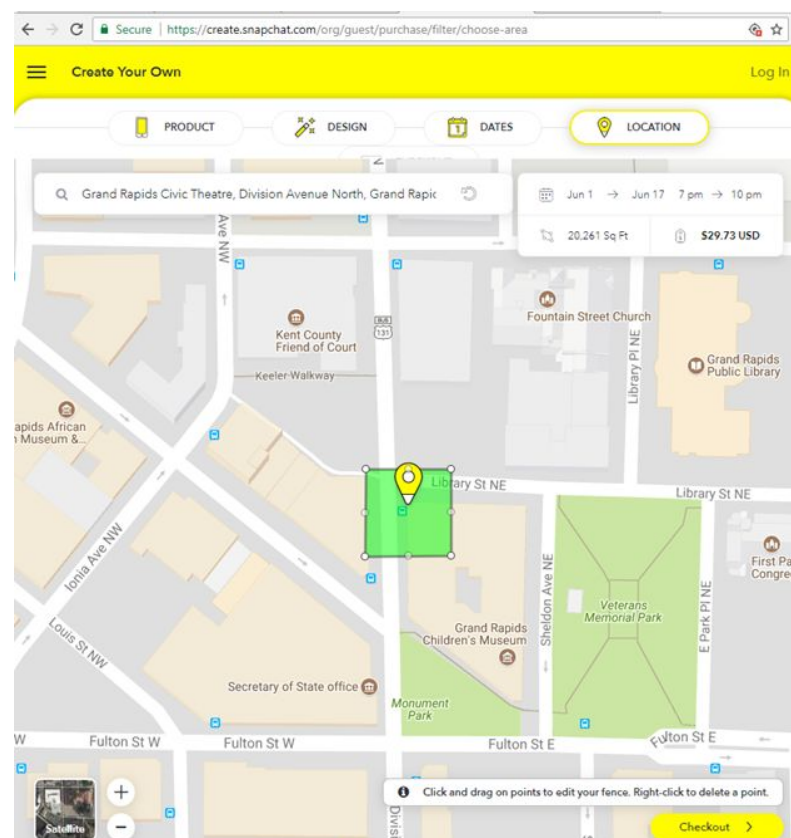
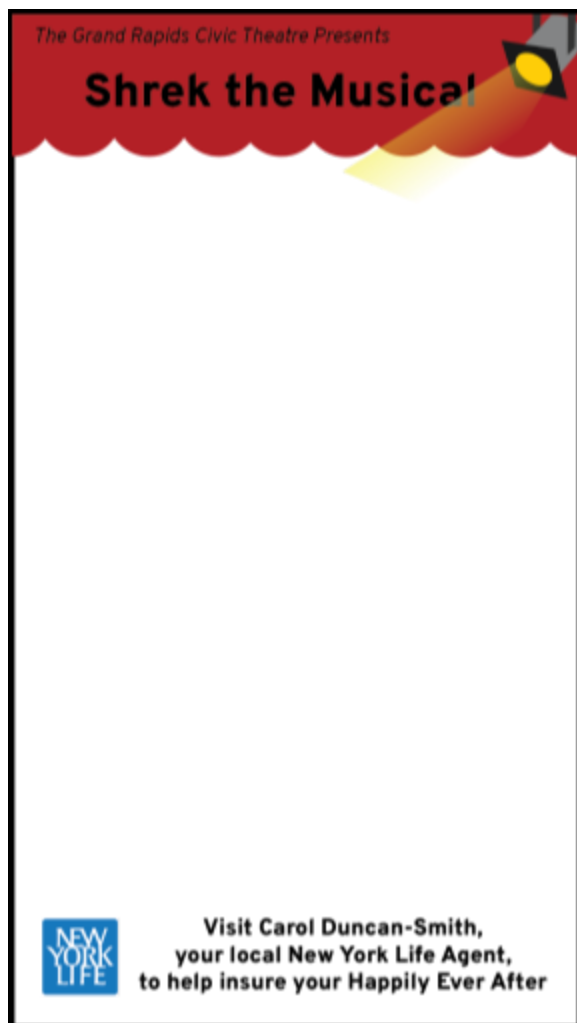
- People who live in Grand Rapids, Michigan + 50-mile radius
- Age: 25-45
- Gender: All
- Languages: None specified
- Demographics:
 - Demographics > Home > Household Composition
 - New Parents
 - Young & hip
 - Demographics > Home > Home Ownership
 - Homeowners
 - Renters
 - Demographics > Life Events
 - Newly Engaged (1 year), (3 months) and (6 months)
 - Newlywed (1 year), (3 months) and (6 months)
 - Recently Moved
 - Demographics > Parents > All Parents
 - New parents (0-12 months)
 - Parents (All)
 - Parents with preschoolers (03-05 years)
 - Parents with toddlers (01-02 years)
 - Parents with early school-age children (06-08 years)
 - Demographics > Relationship > Relationship Status
 - Engaged
 - Married
- With the location, age range and demographic in place, the estimated daily results for reach are 350-2,200 people.
- The facebook ad campaign with the video would run for 2 months for **\$61.00, or \$1 per day.**
- In addition to the campaign, there is the boost option on any post on Carol Duncan-Smith's page. The minimum for a boosted post is **\$1 per day** and a post can be boosted for multiple days at this rate.
 - When selecting a post to boost, you can select the same demographic described earlier in this section.
 - It is recommended that you boost posts that have a direct impact on your audience. Maybe that is boosting a post about life

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insurance, home insurance, or saving money for your growing family.

- With **\$61.00** going to the video advertisement for two months, there is **\$14** left in the social media advertising budget. We recommend you choose one post each month that you think 25-45-year-olds would find interesting and boost it for a day. Then there is money left to boost 2 more posts or support any of the boosted posts for more than a day.

In addition to the Event listed below, there is a snapchat filter that will be available on the dates *Shrek the Musical* is performing at the Grand Rapids Civic Theatre (June 1 through 17) that will feature the image below. The cost for this is listed in the event section. (Note: the border is just to frame the geofilter as the background is transparent).



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Sponsoring an Event

The goal is to secure a degree of event sponsorship to get the word out about the services offered through New York Life Agent Carol Duncan-Smith.

Sponsoring: Grand Rapids Civic Theater

Contact: Autumn Hubbard at a.hubbard@grct.org, 616-222-6650 ext. 6667.

We plan on promoting the business of Carol Duncan-Smith in several ways.

1. By becoming a Spotlight Sponsor at the “Rehearsal” Level (Cost: **\$1,500**). This level will be supporting the theater all season long, and includes 20 tickets, 4 vouchers (equaling 8 tickets), and a quarter page Playbill ad in the Holiday Musical.
2. By purchasing a Playbill ad during one of their Family/Children’s theater performances: *Shrek the Musical*, June 1-17, 2018 (potential reach of 10,000 audience members). An ad during this show will reach the target audience of young families. (Cost for a quarter page ad: **\$250**)

Sample Playbill Ad for both shows:



Carol Duncan-Smith, the expert you have been looking for to help guide your family through confusing insurance decisions.

Specialist in:

- Financial Services
- Life Insurance
- Education Funding
- and more.

Flexible options for GROWING families!

NEW YORK LIFE

Contact Agent Carol Duncan-Smith:

(616) 204-3213

333 Bridge Street NW, Suite 600
Grand Rapids, MI 49504-5365

cduncansmit@ft.newyorklife.com

3. “Hijack the show” by creating a fun Snapchat geofilter that will be live during evening performances of *Shrek the Musical* that also advertises “New York Life Agent Carol Duncan-Smith”. (Cost: **\$29.73**)
4. Pitch to local news stations and radio stations that you would like to go on air and give away some tickets to *Shrek the Musical*/another show.

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Sponsoring the theater at the “Rehearsal” level provides the chance to do several raffles/giveaways of some of the tickets you receive when sponsoring at this level. (Cost: **\$0**)

PITCH:

Hello, _____,

I am interested in doing a **giveaway for tickets to *Shrek the Musical* at the Grand Rapids Civic Theater**. My name is Carol Duncan-Smith, an agent with New York Life and a sponsor of the Grand Rapids Civic Theater this season.

I have a set of _____ tickets that I would like to offer to a (listener/viewer) of your show, in whatever way your news station is most comfortable. I am open to coming in and being on-air to help conduct the giveaway, or simply being mentioned in the giveaway, if the station would like to hold the contest independently.

I am looking forward to working with you on this fun giveaway for your (listeners/viewers)!

You can reach me:

(616) 204-3213

cduncansmit@ft.newyorklife.com

333 Bridge Street NW, Suite 600, Grand Rapids, MI 49504-5365

Have a wonderful day!

Carol Duncan-Smith

New York Life Agent, Grand Rapids, MI

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Budget, Timeline, and Evaluation

Budget:

ITEM	COST
Grand Rapids Civic Theater Spotlight Sponsor - "Rehearsal Level"	\$1,500.00
Quarter Page Ad in the <i>Shrek the Musical</i> Playbill	\$250.00
Snapchat Geofilter (for duration of the show)	\$29.73
New Business Cards	\$20.00
Facebook Social Advertising (AD)	\$61.00
Facebook Social Advertising (Boosted Posts)	\$14
TOTAL	\$1,8743.73
Initial Budget (\$2,000 + \$75 exclusively for social media advertising)	\$2,075.00
<i>Under Budget?</i>	\$125.27

Timeline:

This timeline is a recommended approach but is designed to be flexible. In most cases, "things to do" are given a window of time instead of a specific date, to allow this timeline to fit into your already planned schedule. It can also be used as a template for future projects.

NOTE: Social media posts are recommended to be boosted at several points throughout this timeline. They can be boosted more often, depending on your own judgement and the content you are sharing. The more posts are boosted, the wider reach you will have, but this doesn't mean every post should be boosted. This timeline does include specific reminders to boost posts, as a starting point for adding this social media tool into your routine of promoting your business.

- **March 2018:**
 - Contact Autumn Hubbard about placing an ad in the Playbill for Grand Rapids Civic Theater's production of *Shrek the Musical* as

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well as inquire with her about becoming a Spotlight Sponsor at the “Rehearsal” level

- Create a Twitter Account and begin posting
- **April 1 - June 1, 2018:** Facebook Ad will be live
- **April 2-6, 2018:** Design new business cards that include the Facebook Page for “Carol Duncan-Smith, Financial Professional with Nylife Securities LLC” as well as the new Twitter account at vistaprint.com
- **April 6, 2018:** Finalize the design of new business cards and order them
- **April 9-27, 2018:**
 - Utilize the free tools Twitter has, such as hashtags, to get your posts to become more visible. Like posts and follow accounts also using related hashtags.
 - Boost at least one post on Facebook during this time to reach a wider audience
- **May 7-11, 2018:** Reach out to local news stations offering to partner with them for a ticket giveaway.
- **May 14-18, 2018:**
 - Continue to post on Facebook and Twitter, especially once you secure a partnership for your ticket giveaway. Tag the news station that partners with you in the posts and boost the posts as well.
 - Send out press release to local news stations
- **May 21-31, 2018:**
 - The ticket giveaway should take place at some point in this week and a half before *Shrek the Musical*.
 - Post about the dates of the giveaway and which news station to pay attention to on all social media. Boost the posts.
 - Upload/purchase the Snapchat geofilter and set the parameters for when you want it to be active.
- **June 1-17, 2018:** *Shrek the Musical* Sponsorship
 - Playbill Ad, Snapchat filter both running
 - Social media posts about how exciting it is to see yourself in the Playbill
- **June 17-29, 2018:** On both Facebook and Twitter, create a “thank you” post for anyone who went to see the show, saw your ad, or used your Snapchat geofilter.

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- **July 2018:** Now that the event is over, direct your focus to other areas of the campaign: building your Social Media following.
 - Boost posts on Facebook, especially posts that include your video
 - Tweet using hashtags and like posts and follow accounts who also use the same/similar hashtags. The goal is to have some of those accounts follow you back. If the post was about how someone was looking for insurance, it may be appropriate to offer your services through replying to their tweet.
 - If applicable, reach out to news stations to conduct a new ticket giveaway (timing will depend on which shows you receive tickets to in your sponsorship package).
- **August-September 2018:** Continue posting on social media, boosting posts on Facebook and using hashtags so your tweets are seen by more people.
- **October 2018:** Use a ticket giveaway to drive more followers to your social media accounts (pick Facebook, Twitter, or both...Facebook is recommended).
 - Create posts announcing the ticket giveaway to _____ show at the Grand Rapids Civic Theater.
 - Boost those posts on Facebook, use hashtags on Twitter.
 - Create rules for the contest: must like your Facebook page/follow you on Twitter and tag a “friend they would go to the show with” in the comments of the post. Once all three steps are completed, they are entered to win!
 - Set a date for the social media contest to be over (Ex: Friday, October 26)
 - On October 26th, randomly select a winning comment, check they follow you on Facebook, and then send them a message/comment on the original post on your Facebook letting them know they have won and that they should reach out to you for the tickets.
- **November-December 2018:** Continue to post regularly on Facebook and Twitter, perhaps utilizing the holidays as ways to make your posts relevant. Use Twitter hashtags and use the final parts of the budget to boost Facebook posts.

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- **December 31, 2018:** Evaluate the Campaign.
 - Did you gain more followers on Facebook and Twitter? Was it the same number that was set out to be reached in the initial campaign goals/objectives?
 - Did you gain more young families as clients?

Final Evaluation:

When evaluating the success of this campaign, success will be measured if the goals and objectives are met. To do this, a baseline measurement should be taken before the campaign is begun, so at the end of the campaign there is data to make comparisons with:

As of February 2018

Facebook likes: 31

Most people reached with a Facebook Post: _____

Twitter Followers: 0

Clients with young families: _____

As of December 31, 2018

Facebook likes: _____

Most people reached with a Facebook Post: _____

Twitter Followers: _____

Clients with young families: _____

A place to do in-depth evaluation at the end of the campaign is Facebook and Twitter analytics. How many people are posts/tweets reaching? What level of engagement is being observed?

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Acknowledgements

Our team would like to thank Dr. Dustin York for sharing his knowledge, helping us brainstorm, and encouraging our team throughout the development of this campaign. We would also like to thank Carol Duncan-Smith, who not only has been willing to fly out to St. Louis to work with us, but has trusted us with her business.

Special thanks to Alex Ovares who agreed to be featured in our promotional video.

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