



TRANSAMERICA LONG TERM CARE MULTI-LIFE ENROLLMENT COMMUNICATION GUIDE



The Multi-Life Marketing Resources You Need TO SUCCEED FROM START TO FINISH

Transamerica Long Term Care makes multi-life sales easy for you every step of the way. Use our focused materials to approach employers and association leaders and to conduct successful enrollments.

This Multi-life Marketing Communication Guide will introduce you to materials that help you:

- **Prospect and Present** your case to employers and association leaders.
- **Maximize Enrollments** with a simple Marketing Communication Plan.
- **Co-Brand Materials** with the intuitive and powerful TransBuilder tool.

WITH TRANSAMERICA'S MULTI-LIFE MATERIALS,
we make your job Easy every step of the way.



MAXIMIZE EMPLOYER PRESENTATIONS WITH MULTI-LIFE PROSPECTING MATERIALS

Since your marketing begins with the employer or association leader, Transamerica offers plenty of materials you can use for prospecting and presentations. These materials help you to demonstrate the ways that a Long Term Care insurance (LTCi) benefit can help your prospect build employee/member loyalty, cultivate a supportive culture, or motivate key employees.

EMPLOYER PROSPECTING MATERIALS



EMPLOYER LETTER

(Printable PDF with co-branding)

Solicit new business, Follow up on requests for information



WHAT WORKS FOR WORK

(8 page printable PDF with co-branding)

LTCi as a win-win benefit



KEY EMPLOYEE

(4 page printable PDF with co-branding)

Why insure key employees



EMPLOYER BROCHURE

(4 page printable PDF with co-branding)

LTC facts, Transamerica's worksite plans



EXECUTIVE CARVE OUT

(4 page printable PDF with co-branding)

Basis for Employer Pays All carve outs



EMPTY CUBICLE

(1 page printable PDF with co-branding)

Employee Advantage ProgramSM



EMPTY CHAIR

(1-page printable PDF with co-branding)

Executive Advantage ProgramSM



EMPTY OFFICE

(1 page printable PDF with co-branding)

Corporate Advantage ProgramSM



click here to see the eKit
PROSPECTING MATERIALS



TIP: Lay the groundwork for credibility.

The best enrollments start with a strong commitment from the employer or association.

COMMUNICATION PLAN

CO-BRANDING MATERIALS

Prospecting

ENROLLMENTS

Stages

Example

Materials

Your Plan

MAXIMIZE ENROLLMENTS WITH A MARKETING PLAN AND CO-BRANDED MATERIALS

CONGRATULATIONS! Your prospecting paid off and you are ready to think about enrollments. Before you start posting signs and sending out materials, however, let's talk about the ways a LTCi enrollment can differ from other employee benefit enrollments. For LTCi coverage, each participant must complete an application, whether it is a paper application, e-app or electronic application. Even reduced underwriting offers (such as MGI, Simplified Issue or Abbreviated Application) require applicant information and signatures.

If you need to learn more about Transamerica's multi-life products and enrollment processes, please see the [Multi-Life Producer Guide](#).

It's easy to create a successful enrollment campaign that reaches individuals with timely messages that create interest, lead to informational interactions, and ultimately allow you or your representative to close take applications. A simple, effective Marketing Communication Plan is based on:



4 Stages of an Enrollment



Your Plan



Enrollment Materials



Co-Branded Materials



Material Types

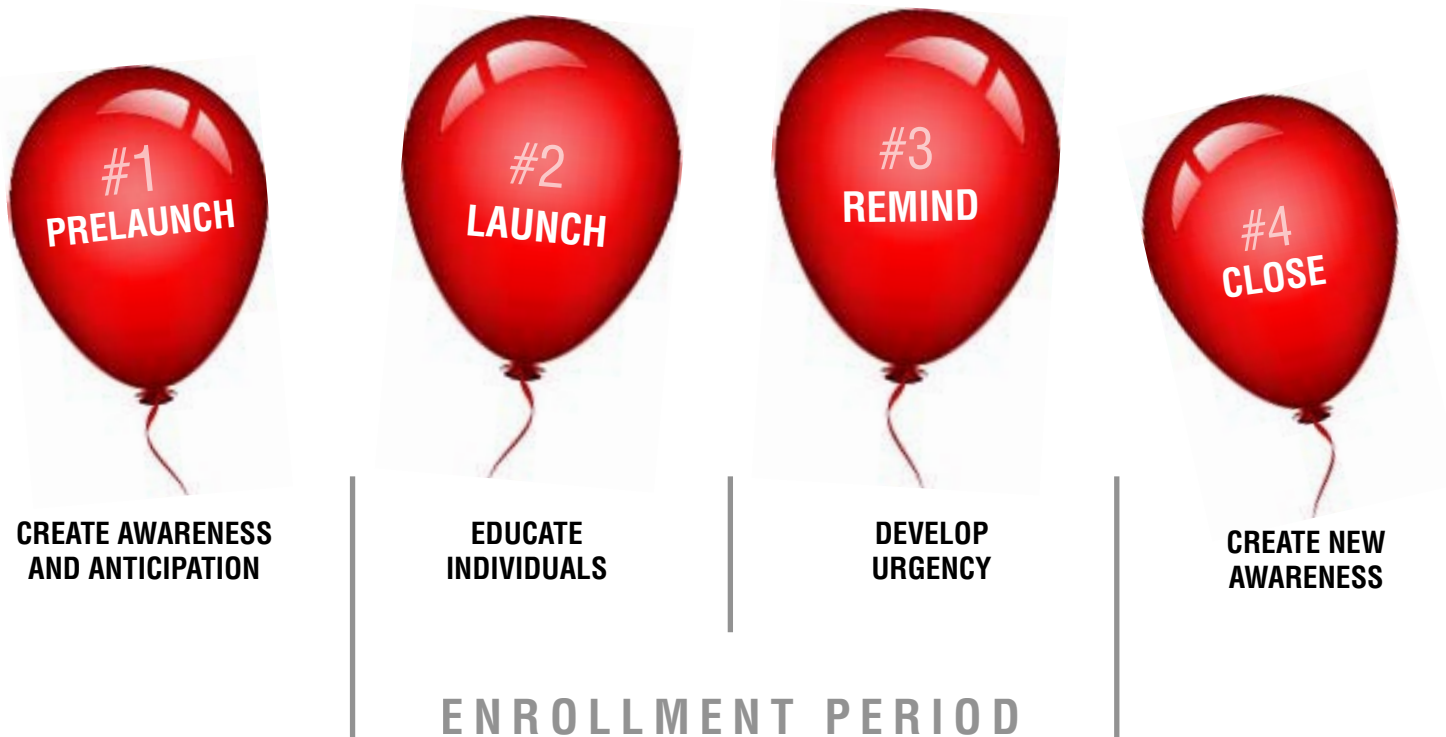


TIP: Avoid combining LTCi with other enrollments.

Give yourself every advantage. Because many people are less familiar with LTC, handling LTCi enrollment separately from other benefit enrollments has been shown to significantly increase participation.

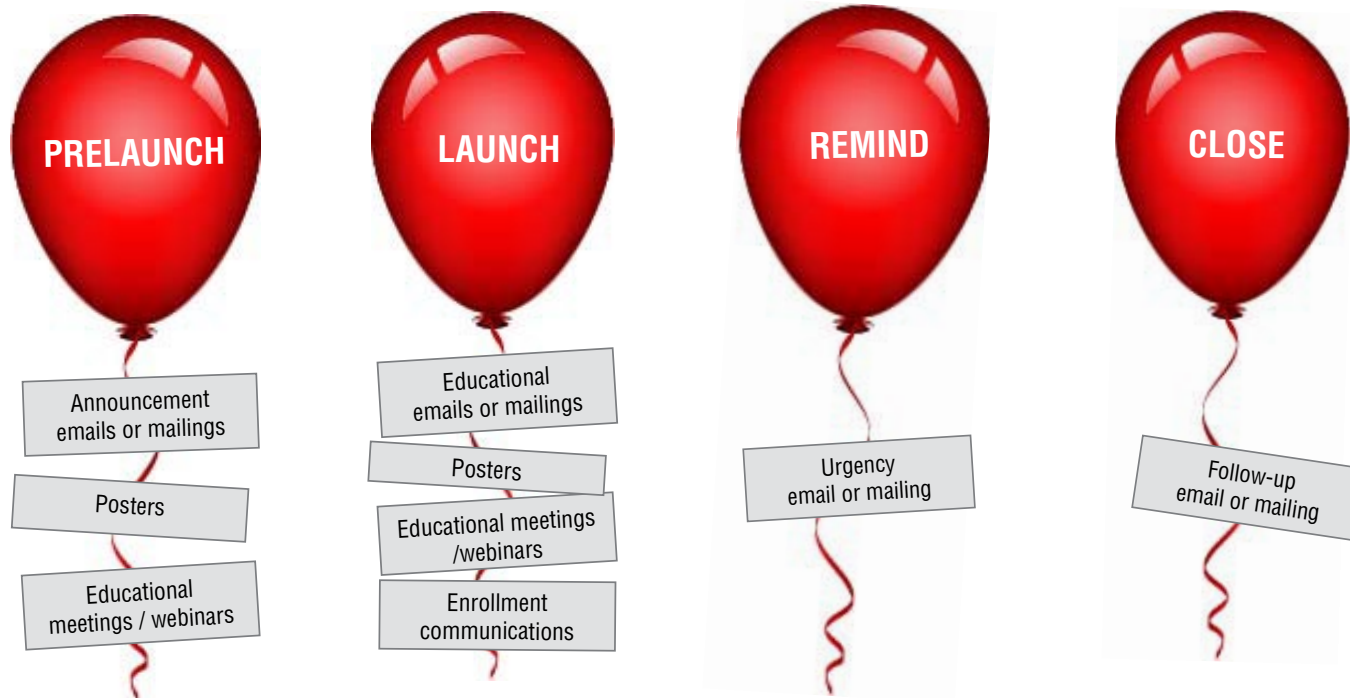
4 STAGES OF A WORKSITE ENROLLMENT

As you think about an enrollment, imagine four stages: Prelaunch, Launch, Remind and Close. The four-stage enrollment process provides a simple framework for understanding how your enrollment materials work together to lead your prospects through the process of awareness, education and purchase. **For associations**, enrollment is usually ongoing so distinct stages may not apply.



A SIMPLE MARKETING COMMUNICATION PLAN FOR WORKSITES

You can use this simple Marketing Communication Plan to organize the most suitable enrollment materials into the most effective timing and sequence (stages). It makes your job easier with a game plan that is easy to follow, plus it provides significant **co-branding options** for your materials.



TIP: Educational meetings are key.

Educational meetings give you a selling advantage. Best practice is to begin holding mandatory meetings or webinars as soon as possible, even before the application period begins. Prospects need time to process information about their need for LTC before you can focus their attention on the LTCi solution.

MULTI-LIFE ENROLLMENT MATERIALS AT-A-GLANCE

For your convenience, we've listed all approved consumer materials on our easy to use Multi-Life Enrollment Materials At-A-Glance chart. We recommend saving a downloaded copy to your desktop or keeping a printed copy handy for quick reference when using our powerful co-branding tool, TransBuilder. *

Multi-Life Enrollment Materials At-A-Glance
For samples of all enrollment materials visit the eKit. Availability by state may vary.

[click here to see the eKit](#)
ENROLLMENT MATERIALS SAMPLES

LINK TO ONLINE PRESENTATION	ENROLLMENT STAGE			
	PRE-LAUNCH	LAUNCH	REMIND	CLOSE
FLYERS/EMAILS				
Don't Miss This Opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How to Apply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Don't Forget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A Growing Need	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*Who Pays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3-in-4 Head II	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Protecting Your Family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Hire Benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
POSTCARDS				
*3 in 4 Head II	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*Protection While Easy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STUFFERS				
*3 in 4 Head II	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*Protection While Easy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
POSTERS				
Meeting Times	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

TIP: Search by title in TransBuilder.
Searching by title in TransBuilder pulls a list of all approved state versions. Being aware of when a material can be used or particularly important for national enrollments. Be mindful that there will most likely be state-specific versions for CA and MT. Clicking on the item description in TransBuilder shows a list of states where that particular version cannot be used. You can always do a materials search by state in TransBuilder. If a state-specific version does not appear then it has not yet been approved.

*These materials are suitable for Associations as well as Worksite enrollments.

AGENT RESOURCE CENTER
WWW.TALTC.COM

TRANSAMERICA

VERSION 0413

DOWNLOAD A PDF OF THE MATERIALS AT A GLANCE

DOWNLOAD EXAMPLES OF COMPANY PRELAUNCH ANNOUNCEMENTS YOU CAN SHARE

How to Use

- **See what's available.** New materials will be added as they are approved.*
- **Quick reference for searches on TransBuilder.** Search by title in TransBuilder to pull a list of all approved state versions.
- **Use presentations effectively.** See which flyers/emails contain interactive links to online multimedia presentations.
- **Plan for all enrollment stages.** See which materials are best for each of the four stages of an enrollment.

*Check periodically for updates by going to www.taltc.com, Order Supplies, and selecting "Agent Guides" in the material type dropdown. A version date will appear at the bottom of the At-A-Glance chart. Additional materials will be added as they are approved.



click here to see the eKit
ENROLLMENT MATERIALS



TIP: Remember the ICC states.

You can use a single version of most materials in more than two-thirds of the U.S. states because that version is approved by the Interstate Insurance Product Regulation Compact Commission (ICC). ICC-approved materials may be used in AL AK CO GA ID IL IA KS KY LA ME MD MA MI MN MS MO NE NH NM NC OH OK OR PA RI SC TN TX UT VT VA WA WV WI WY. For non-ICC states you may need a state-specific version, especially in CA and MT.

BUILD YOUR OWN MARKETING COMMUNICATION PLAN IN 3 SIMPLE STEPS



1 Distinct stages may not apply to associations where enrollment is ongoing.

2 Space out your communications throughout the approved enrollment period and don't forget Pre-launch.

3 Review the marketing plan you submitted with your SGR, select the Transamerica materials you will use, and transfer your plan to a calendar.

WE MAKE CO-BRANDING EASY

Co-branding your enrollment materials helps boost the results of your Marketing Communication Plan. The ability to co-brand and customize Transamerica materials is available to you 24/7 through our TransBuilder tool. Quickly and seamlessly embed your contact information, logo, enrollment dates, and more in Transamerica's best marketing materials.

You can create your own personalized materials and download them for your use – at **no cost to you!** TransBuilder also allows you to take advantage of corporate pricing on all printed materials if that's what you need.

Where to find TransBuilder

You can find TransBuilder on the Agent Resource Center. Just log in and select "Order Supplies." From there select "TransBuilder" in the sub-menu to start creating your own personalized marketing pieces.

- Search by Title to access all approved versions.*
- You can also search by Product Type, Material Type, or Order Type to locate other materials you need.

* Use only the versions approved for the states where you are marketing. See "**Remember the ICC States.**"

TRANSBUILDER

BY TRANSAMERICA LONG TERM CARE



WHAT TO CUSTOMIZE WITH TransBuilder

Customizing your materials with TransBuilders increases your credibility as it reminds enrollees of your relationship with their organization. It also reinforces your position as the LTCi expert and makes it easy to contact you. Besides enrollment materials, don't forget to order enough copies of sales literature you want to have on hand for your meetings and enrollment appointments.

ENROLLMENT CAMPAIGN MATERIALS

Options: Available customization options will vary by piece, depending on the material type and which stage the pieces are used. Typically, customization options include: Your logo and contact information, the worksite/association's logo, enrollment dates.

SALES LITERATURE

Options: Add your contact information and your worksite/association logo.

We suggest: For informational meetings, use literature like the Quick Product Brochure, the Long Term Care Essentials Brochure and the Longevity Brochure.

For enrollment appointments, use literature like the Product Brochure and the Needs Brochure.



TIP: Order materials early.

Materials take time to print and ship, so plan ahead. Be sure to budget some of your own time for customizing the necessary versions of each piece in TransBuilder, as well.

MATERIAL TYPES AND HOW TO USE THEM

Because we offer materials in several formats, you may wonder which type to use. The answer is not the same for every enrollment. You can check the information below to learn more about which type could work best for your current need.



Flyers/emails	Postcards	Stuffers	Posters
<p>PDFs are most often used as attachments to emails. In some cases, they are also suitable for you to print and distribute as flyers, or post on company intranets.</p> <p>Format: Customizable in TransBuilder, to download or receive printed copies. Size: 8.5 x approx. 11 inches. Price: Starting at \$0.26 each Interactive Links: Some PDFs include a hot-link to an online presentation. Tip: To insert a flyer in the body of an email, convert it to JPG format.</p>	<p>Postcards can carry awareness of the LTCi benefit into a home. This is often a preferred format for associations, which may not have a way to email members. Postcards are also useful for directly reaching an employee's family members, who may influence a decision or purchase coverage for themselves.</p> <p>Format: Customizable in TransBuilder, to be printed and shipped to you or mailed to your list. Size: 8.5 x 5.5 inches. Price: Starting at \$0.48 each</p>	<p>Add a stuffer or ride-along in a work-site or association's mailing of bills, paystubs or other correspondence. Stuffers may be especially important for associations if they do not have a way to email members.</p> <p>Format: Customizable in TransBuilder, to be printed and shipped to you. Size: 8.5 x 3.66 inches. Price: Starting at \$0.48 each</p>	<p>Placing posters throughout the work-site presents a constant reminder of the LTCi benefit offer. Posters provide a ready source of information about your meetings and how to contact you.</p> <p>Format: Printed and shipped to you with your TransBuilder customization or with meeting information left blank. Size: 11 x 17 inches. Price: Starting at \$0.80 each</p>

NOW YOU KNOW HOW, SO GET STARTED

As you can see, a Marketing Communication Plan is easy to develop and can make all the difference in your multi-life enrollment. Transamerica provides you with materials focused to help you succeed – and you can customize them instantly with TransBuilder. **Now it's time to put our materials to work for you!**

PROSPECTING

To acquaint yourself with the employer prospecting materials, visit the ekit.

MAXIMIZING ENROLLMENTS

Use the Multi-Life Enrollment Materials Availability Chart to help plan your Marketing Communication Plan in four simple stages.

CO-BRAND MATERIALS

Drop by the online Agent Resource Center to experience the intuitive, powerful TransBuilder customizing tool.

WITH TRANSAMERICA'S MULTI-LIFE MATERIALS,
we make your job Easy every step of the way.

