

# What to Do Now to Put Your “Bank On Yourself Prospect and Client ‘Done-For-You’ Direct Mail Contact Program” in High Gear

## Section 1: How to Set up Your Send Out Cards Account

If you have an assistant, these step-by-step instructions will be all he or she needs to set up your account for you. Having set up your account, it will be easier for him or her to maintain it on an ongoing basis.

1. Go to [sendoutcards.com/BankOnYourself](http://sendoutcards.com/BankOnYourself). You'll know you're on the right page if you see Pamela Yellen's picture. (link is case sensitive)
  - You must join Send Out Cards using the link above, to waive the \$25.00 per month Bank On Yourself campaign fee
  - You may use a different Send Out Cards account, and you will be charged the \$25.00 per month campaign fee to participate in the Bank On Yourself campaign.
2. On this Send Out Cards page, click “Join” in the upper right corner, fill in the form and click “save”.
3. Next click “Continue” on the welcome page to take you to the subscription page.
4. Here you can select your subscription plan. We recommend the \$97 Monthly subscription. This **Premium** plan is the best value for Bank On Yourself Authorized Advisors. Each full-color personalized campaign postcard you send will cost just \$1.75 which includes postage. This plan also gives you the ability to do group sends, gives you a 30% discount on gift purchases, and includes premium storage.
5. The next few pop up pages will be address and payment information forms to finish the sign up process.

As you consider which plan is right for you, think beyond your Bank On Yourself clients and prospects! You may want to use Send Out Cards for personal card and gift sending as well, because it is so convenient and cost-effective. (Where else can you buy the perfect birthday card for your Aunt Bertha for less than \$1.80?) There are thousands upon thousands of beautiful cards available for all occasions, and they can be personalized with handwritten messages, pictures, and so forth. *You may find your spouse wants to use Send Out Cards, as well!*

That's it! You're now enrolled in the program. The next section will show you how to tell Send Out Cards who your prospects and clients are, so they can benefit from Pamela's Done-For-You monthly marketing messages.

## Section 2: How to Easily Import Your Prospects and Clients into Your Send Out Cards Account

Part of the power of Send Out Cards is the ability to send a personalized postcard or greeting card to an entire group of contacts at one time. Unless you are already an experienced Send Out Cards user, your first step to import your prospects and clients is to set up two spreadsheets: “**Prospects**” and “**Clients**.” (You *could* name your lists “**Life Insurance Leads**” and “**All My Existing Customers**,” but why not keep it simple?)

Later you may add other groups, such as family, colleagues, friends, and so forth. But all you need in order to participate in the Bank On Yourself campaign is just two lists: Clients and Prospects.

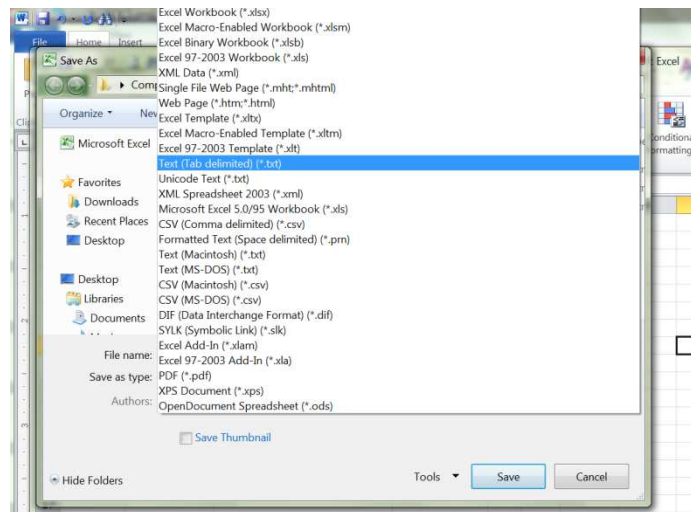
Follow these simple steps to set up your import lists, or you can watch the tutorial within SOC at: <https://www.sendoutcards.com/resources/tutorials/>

1. Using the Send Out Cards “Import Contacts” system, you will be able to get all your prospects and clients into Send Out Cards without having to type each name and contact information, *if you have your contacts in an Excel spreadsheet*. If you have them in another contact manager, export them from that contact manager, and import them into Excel. It’s easiest to import your clients if you have two separate spreadsheets, one for prospects and one for clients
  - Each spreadsheet should have separate columns containing the following information:
    - First name
    - Last name
    - Spouse first name
    - Street address
    - City
    - State
    - ZIP or postal code
    - Group (you will specify “Prospect” or “Client” in this column)

- The following columns are *optional*. If you have the information, by all means import it. Send Out Cards can make use of it later for follow-up and stay-in-touch contacts such as birthdays and anniversaries:

- Company name
- Home phone
- Work phone
- Cell phone
- Fax number
- Other phone
- Web address
- Client's birthday
- Spouse's birthday (if applicable)
- Anniversary (Decide if you want to use this field for "**Policy Anniversary**" or for "**Wedding Anniversary**." There's only one "anniversary" field, and you'll need to be consistent)

2. Save a copy of this file for your own records and then you will also need to save a copy as a text (tab delimited) (\*.txt) or (CSV) file for importing. (This is the only file format that SOC will be able to read.)

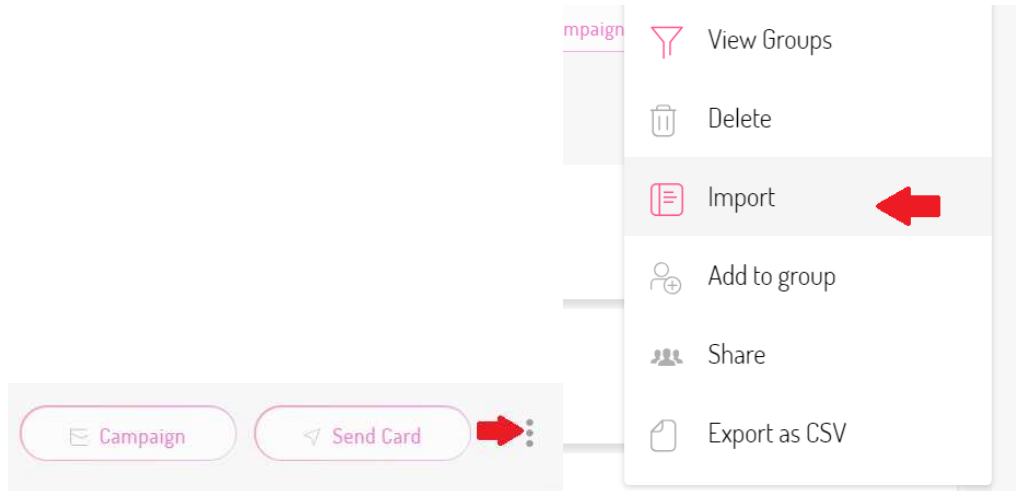


3. Once your lists are prepared, if you're not already logged in to Send Out Cards, go to [www.SendOutCards.com](http://www.SendOutCards.com) and log in (upper right corner) with the username and password you created earlier.

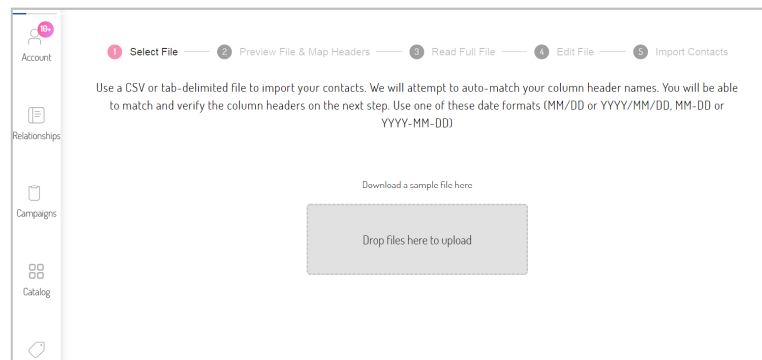
4. On the Send Out Cards main page, click Relationships on the left side of the screen. This is where you will be importing your lists.



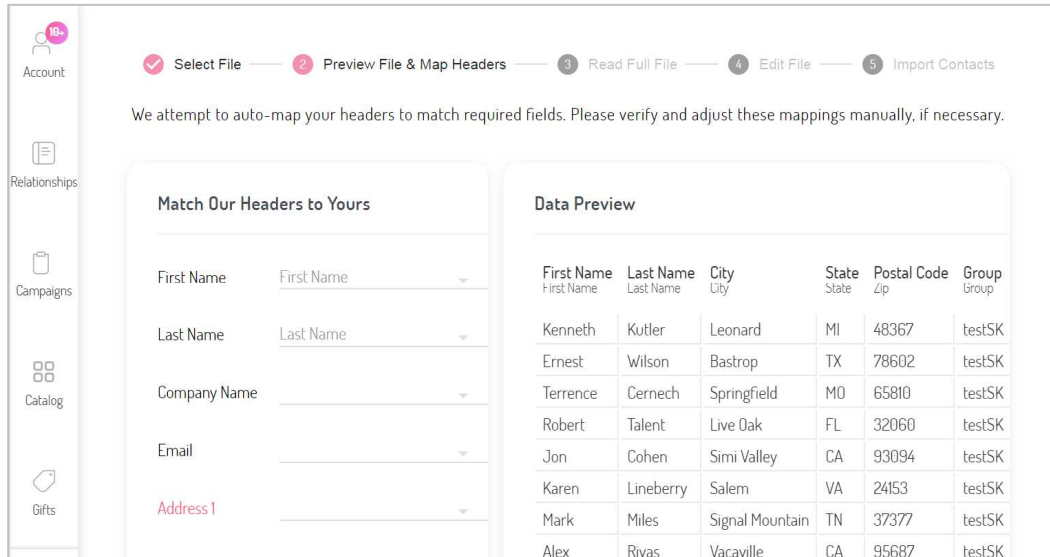
5. On the right side of the page, click the three dots to open a menu and then click on "Import":



6. Drag and drop your prepared .txt file into the space provided



- The next screen will show you a preview of your imported list and give you a chance to match the headers of your columns to those in SOC. Simply click the down arrow next to each section to match each heading to the correct one in SOC.



- Once you have your columns matched, click next to review and then click import. Follow the above steps for each of your lists.
- When you're finished, we also recommend that you add your own name and address to your contact list. Add yourself to *both* your Prospects and Clients groups, so you will receive a copy of every postcard you mail.

That's it! You have successfully added contacts into your SOC account.

\*In order to see your contacts or groups, you can click Relationships again and then the three dots to choose either View Groups or View Contacts.

## Section 3: How Campaigns Work

When you use Send Out Cards to send a card to a *group*, that's called a *Campaign*. You *could* use a card you design yourself, but since you're now a member of the **Bank On Yourself Prospect and Client 'Done-For-You' Direct Mail Contact Program**, you'll use the cards that we design for you. Each month, there are two campaigns, one for *prospects* and one for *clients*.

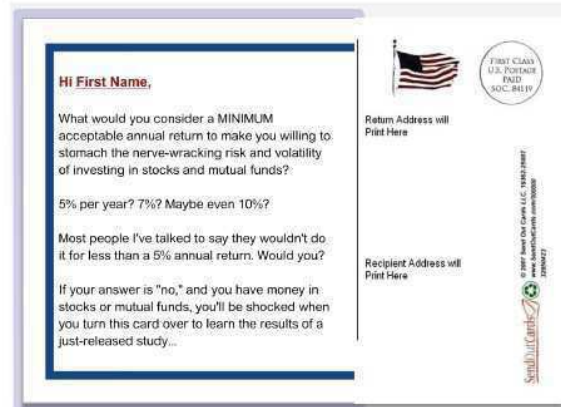
Understanding how campaigns work is key to using your Send Out Cards account effectively. To see your campaigns, click the "Campaigns" button on the left side menu. NOTE: Send Out Cards has help buttons on all pages which offer tips and or the ability to chat with a SOC representative.



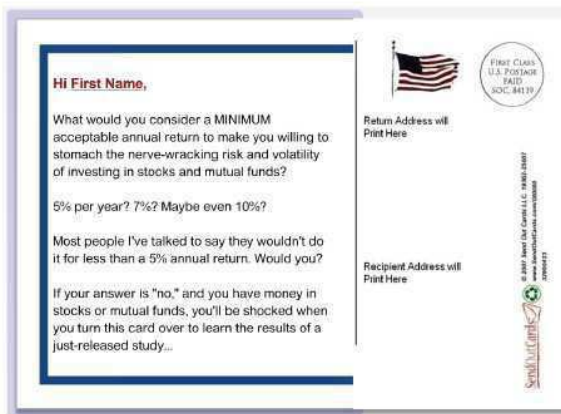
Remember, we have already created your postcards *for you*. Each month you will receive an email from Bank On Yourself, telling you that the campaigns for that month are ready. These campaigns will be located in the "My Campaigns" tab.

Below, you'll be able to see a sample of what the cards look like, just like this sample from May 2015 (a card with two sides for your prospects, and a card with two sides for your clients).

1. Notice that you must personalize each card, every month. After you or your assistant has personalized the monthly campaigns once or twice, it will probably take less than five minutes per month.
2. Note that you should make no changes to the address-side of the card! On the address side of the postcard where it says "Hi First Name," Send Out Cards will automatically insert the first name of the contact that the card is being sent to, and will also insert your return address and your client's address.
3. On the other side of the card, you'll need to personalize the card by adding your photo and your first and last name, company name, phone number, and email address where indicated. We show you below where the personalization goes. Note that the gray rectangle is for *your picture*.



May 2015 - Prospect



May 2015 - Client

- To learn about getting your picture into Send Out Cards, follow the “tips” available (if you turned them on in the help button) or you can chat with a representative.

Any time you have questions about the Send Out Cards program, your best resource is the chat function available on the Send Out Cards website.

If you have questions about the Bank On Yourself side of the program, contact the Bank On Yourself tech guru, Lindsey Focht, at [lindseyfocht3@gmail.com](mailto:lindseyfocht3@gmail.com). Or contact Stephanie Kronlein at [stephanipmi@gmail.com](mailto:stephanipmi@gmail.com).