



## **Hallmark Greeting Cards Work Better Than Letters, Phone Calls and Other Greeting Cards**

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How a financial services company with over 10,000 locations used Hallmark cards to improve client retention and agent engagement.

## BACKGROUND

A financial services company with over 10,000 locations was looking for a unique way to build the relationships between their financial advisors and their customers. Knowing that direct mail is a strong performer in the financial services and insurance businesses, the company was determined to find a solution that would stand out in the competitive environment.



***89% of insurance and financial services businesses use direct mail.***

2017 DMA Response Rate Report

The financial services company enlisted the help of Hallmark Business Connections, and together, the two set forth to develop a program with the following priorities:

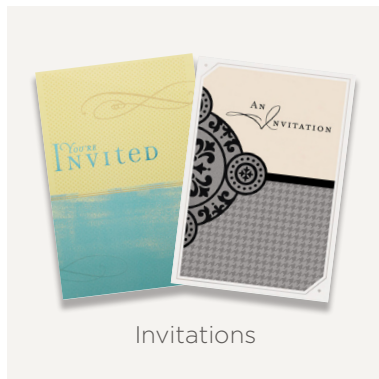
- **Relationship-focused:** The program must build personal, trusted relationships between the office admins, the financial advisors and their customers through strategic personalization.
- **Long-term:** The program must be frequently refreshed to keep both customers and advisors engaged.
- **Diverse:** The program needs to be diverse enough to make customers feel like they are being personally addressed including religious celebrations and ethnic traditions.
- **Easy to use:** The program must integrate with the company's existing CRM and corporate billing systems and alleviate time-wasting activities, such as signing, addressing and mailing.
- **Cost-effective:** The program must find innovative ways to be cost effective for advisors, such as bulk order pricing and inventory management.

## THE SOLUTION

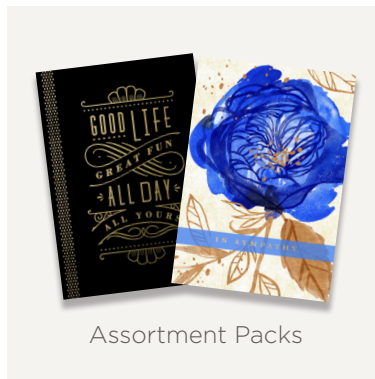
Hallmark Business Connections developed an exclusive online Hallmark shop for the financial services company consisting of:

- A suite of over 50 Hallmark cards
- A collection of custom cards that infused the company's brand
- A vast array of cards that addressed specific religious, ethnic and targeted occasions
- Specialty branded Hallmark products for giving to clients and within the gifting guidelines of the company
- Annual product updates that keep the Hallmark experience fresh and new

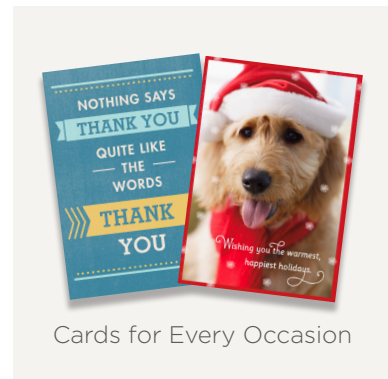
Not only was the suite of cards specifically curated for the brand, it implemented the high standards of the Hallmark product, addressed both informal and formal communications and included varying price points.



Invitations



Assortment Packs



Cards for Every Occasion

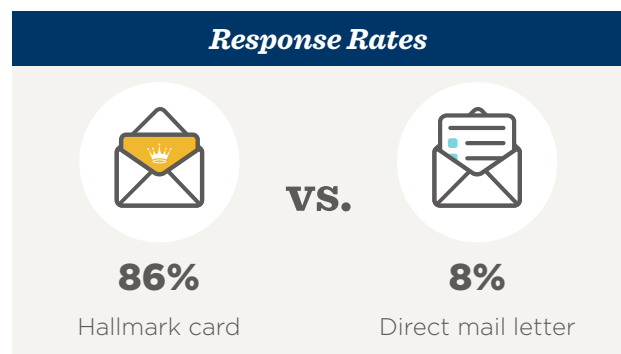
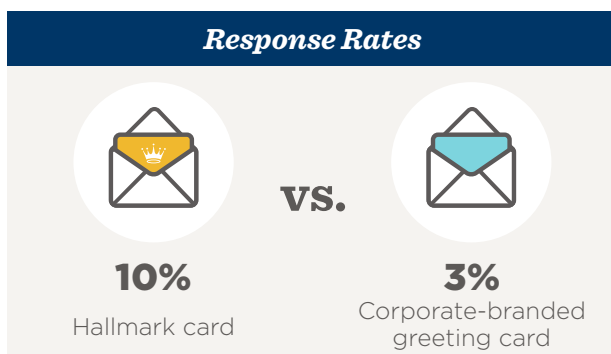
To address usability, Hallmark Business Connections also integrated the online card shop into the company's existing CRM and billing systems, which make personalizing, addressing and mailing cards seamless, fast and efficient. This integration keeps advisors focused on improving existing customer relationships and building new ones. It also keeps admins focused on the day-to-day needs of the office.

## THE RESULTS

The greeting card suite solution has not only stood the test of time, but it has thrived, grown and become instrumental to the financial services company over the past 10 years. Eighty-seven percent of their financial advisors say that sending Hallmark cards is vital to their health of their business.



The company also tested its Hallmark cards against corporate-branded greeting cards, letters and phone calls. Hallmark cards improved response significantly over all three of these.



**2x** Hallmark cards had double the response rate of over-the-phone invitations.

In addition to the response rate metrics, the company collected positive feedback about the program from both agents and office admins:

***We used the CRM integration for sending our seminar invites. It was great.***

*- Office Admin*



***Sending cards helps to build the philosophy of getting to know the client...[and] truly sets [us] apart from the competition.***

*- Financial Advisor*

***Thanks for making this part of my job as easy and quick as possible. Prices are reasonable, and your delivery times are great!***

*- Office Admin*



***We have had several clients call or drop by to just say thank you for remembering them.***

*- Financial Advisor*

***Hallmark cards allow us to put our best foot forward without breaking the bank.***

*- Financial Advisor*



## Contact Us

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