

Grip Campaign: Targeted Direct Marketing

Budget: \$950 for 10 recipients

What: “Grip” campaign in which we send interesting and creative objects to offices of Centers of Influence and/or prospects.

Why: To become front of mind with targeted prospects and/or Centers of Influence with whom we would like to create a relationship in order to motivate them to refer Cash Balance Business to us and/or to put a plan in place themselves.

Who: 10 Targeted Cash Balance Prospects

When: 8 Weeks: Packages sent Week 1, Week 4, and Week 7. Follow up call Week 8.

How: The Breakdown

Week 1 (Estimate: \$390)

What: \$20 Starbucks Card and Mug
Cash Balance Limits Card and Business Card

Where: Starbucks

Price: Gift card \$20
Mug \$12

Shipping: \$7 each (approximately)

Handwritten Note:

“I hope you like Starbucks as much as we do and enjoy the enclosed Starbucks gift card and mug. I’d love to meet to discuss how we can add value to your company’s retirement program. Sincerely, Ken Guidroz”



Week 4 (Estimate \$260)

What: *The Office* Dwight Schrute bobblehead
Cash Balance Limits Card, Article and Business Card

Where: NBC.com

Price: Dwight Bobbleheads \$19.00

Shipping: \$7 each (approximately)

Handwritten Note:

“We are unabashed fans of “The Office.” Enjoy. Sincerely, Ken Guidroz”



Week 7 (Estimate: \$287.10)

What: *The Worst-Case Scenario Survival Handbook: Work* by Joshua Piven and David Borgenicht;
Trail Mix
Heat Treat Hand Warmers – Two Pack, Space Emergency Blanket
Business card

Where: Amazon.com
Costco
REI

Price: Book \$11.21
Trail Mix \$5.00
Hand Warmers \$1.50
Blanket \$4.00

Shipping: Free on Amazon.com to the office + \$7 each (approximately)



Handwritten Note:

"We hope this Kit will help you survive the office. We know it can be a jungle out there. I'll be calling your office next week to follow up. Sincerely, Ken Guidroz"

Week 8 Call to follow up!

- Did you receive the items we sent? Did you enjoy them?
- We also sent some material about Cash Balance
- What kind of retirement plan do you currently have?
- Are your partners happy with the plan?

