



**Feedback Summary Report**  
**AFM Marketing Forum**

Wednesday 5 September 2018

**Lethaby Room, Mary Ward House, 7 Tavistock Place, London WC1H 9SN**

**Agenda**

- 1015 Registration and tea/coffee on arrival
- 1045 Chair's welcome and opening remarks, *Ann-Marie O'Dea, Shepherd's Friendly*
- 1100 Customer Centric Marketing, *Daniel Batey, Union Data*
- 1145 Breakout session
- 1230 Are you communicating effectively with your older and elderly customers? *Graeme McKenzie, Let's Talk Ageing*
- 1300 Lunch
- 1345 The Digital Landscape and what's next with Google Search, Online Advertising & Website Experience, *Ed Ryan, Hallam*
- 1430 Digital Marketing Q&A
- 1500 Marketing Collaboration, *Ben Pears, Kingston Unity*
- 1530 Chair's closing remarks

**Attendance**

A total of 38 people attended, with representation from the following 27 organisations

Organisation	No.	Organisation	No.	Organisation	No.
AFM	2	Holloway Friendly	1	RMML	1
BHSF	1	ICMIF	1	Sheffield Mutual	2
British Friendly	1	Kingston Unity	3	Silver Marketing	2
Cirencester Friendly	1	Let's Talk Ageing	1	Sovereign Healthcare	1
CS Healthcare	1	MetFriendly	2	Tees Mutual	1
Dentists Provident	1	Holloway Friendly	1	The Oddfellows	1
Foresters Friendly	1	ICMIF	1	Transport Friendly	1
Hallam Internet	1	National Friendly	3	Union Data	2
Healthy Investments	1	PG Mutual	1	UIA	1
				VetDef	1

## **Feedback**

As this was the first Marketing Forum hosted by AFM, delegates were given the opportunity to feedback and help shape future events. Feedback was collected during the Marketing Collaboration session, as well as via an online survey circulated immediately after the Forum.

The Marketing Collaboration captured aspirations for future marketing events and collaboration around marketing/PR. The Survey Monkey questionnaire captured feedback about the day itself, including rating of presentations and venue.

A summary of feedback from each method is shown below:

### **Collaboration Report (collated by Ben Pears, Kingston Unity)**

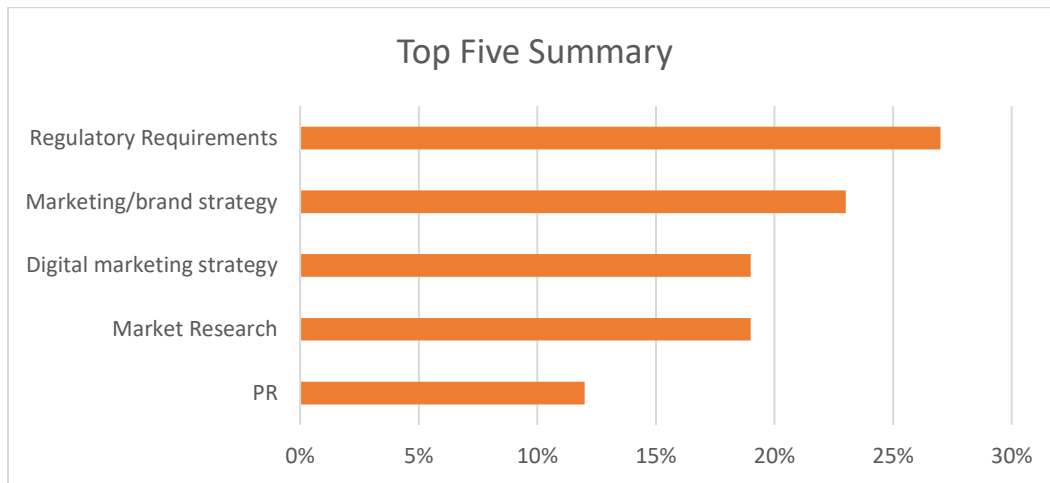
Feedback was gathered from a number of small teams on a small range of subjects, which this report summarises.

#### **Question 1: What are your challenges and how can the AFM Marketing Forum help overcome them?**

##### **A. Marketing Topics**

<ul style="list-style-type: none"><li>• Digital Advancements/innovations;</li><li>• Digital Refreshment;</li><li>• Social Media (inc. Conversion Rate Expectations);</li><li>• Customer Experience Research;</li><li>• Financial Promotions and regulations;</li><li>• Insurance Distribution Directive;</li><li>• Digital Agencies;</li><li>• Getting the most from your agency / agency management;</li><li>• Benefits of Agencies vs Internal marketing;</li><li>• Email Marketing (including automation);</li><li>• Data Analytics / Google Analytics;</li><li>• CRM Tools;</li><li>• Traditional Direct Marketing (inc. Mailings);</li><li>• External data and how to manage these sources;</li><li>• Website audit;</li><li>• Post GDPR telemarketing / prospecting;</li><li>• Customer persona research to help identify segmentation options;</li><li>• Market research;</li><li>• Budget Management;</li></ul>	<ul style="list-style-type: none"><li>• Rebranding;</li><li>• Brand Awareness;</li><li>• Product Innovation;</li><li>• Blog / Content writing;</li><li>• Member Benefit Programmes;</li><li>• Insights into forward looking modern mutuals;</li><li>• Public Relations;</li><li>• Influencer marketing;</li><li>• Video/Story telling;</li><li>• Referral Schemes;</li><li>• Terminology;</li><li>• Regulatory / Compliance Insights;</li><li>• Resource (Budget / Time) Management;</li><li>• Planning tips / planning methods;</li><li>• Retargeting;</li><li>• Member retention / retention strategies;</li><li>• Consumer Research;</li><li>• Copywriting;</li><li>• Press Releases;</li><li>• Targeted Communications to specific Demographics</li><li>• Knowing the audience</li></ul>
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**Marketing Topics cont.**



**There were also comments around a list of market research topics, including:**

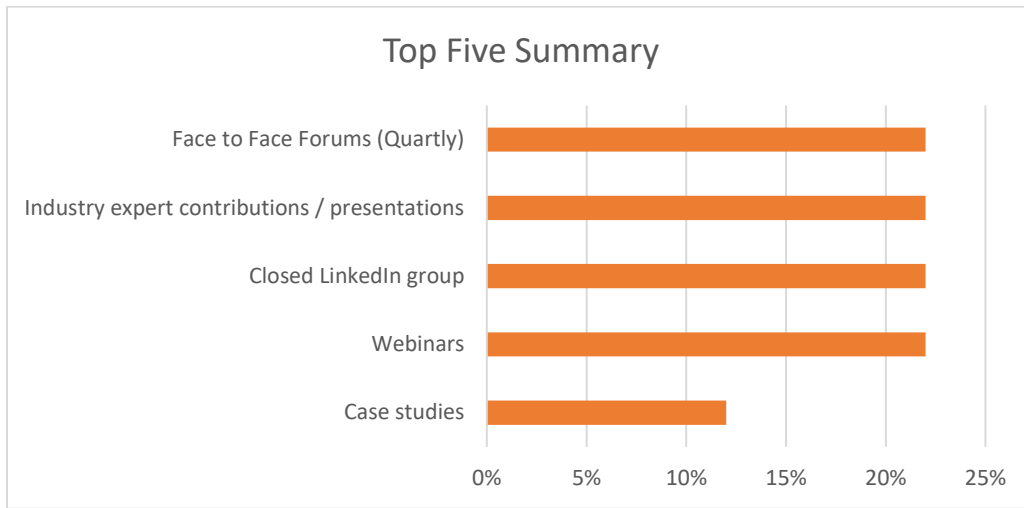
- Relevance of Mutuals in the modern world;
- What does mutuality mean to the consumer;
- Does being a mutual influence consumer decision making;
- Public Perception of Mutuals

**B. Method of Consumption**

Suggestions of how AFM Members would like to receive information included:

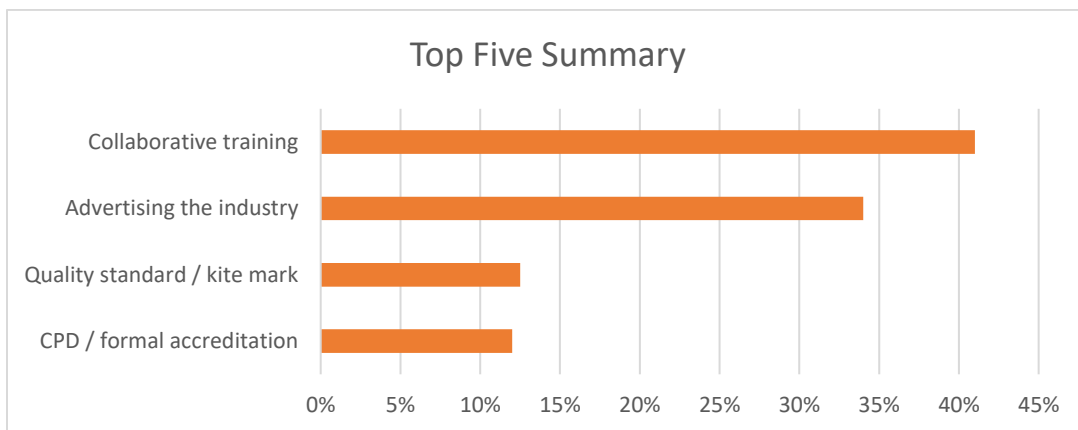
<ul style="list-style-type: none"> <li>• Regular Face to face meetings;</li> <li>• Forum – Monthly</li> <li>• Forum – Quarterly</li> <li>• Forum – Half Yearly</li> <li>• Marketing Forum at AFM AGM &amp; Conference;</li> <li>• Surgery Sessions with panels of experts</li> <li>• Key note / industry experts / experts from outside the industry speakers</li> <li>• Webinars;</li> <li>• Circulate external presentations after events;</li> </ul>	<ul style="list-style-type: none"> <li>• Online Closed Forum – LinkedIn Group / Microsoft Teams / Facebook</li> <li>• Slide Share and Notes;</li> <li>• AFM Portal with push notifications;</li> <li>• Film forums for access on website;</li> <li>• List of external resources/tools for the industry;</li> <li>• List of helpful websites;</li> <li>• E-Newsletter;</li> <li>• Blogs from experts;</li> <li>• Case studies</li> </ul>
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**Method of Consumption cont.**



**C. Areas of Collaboration**

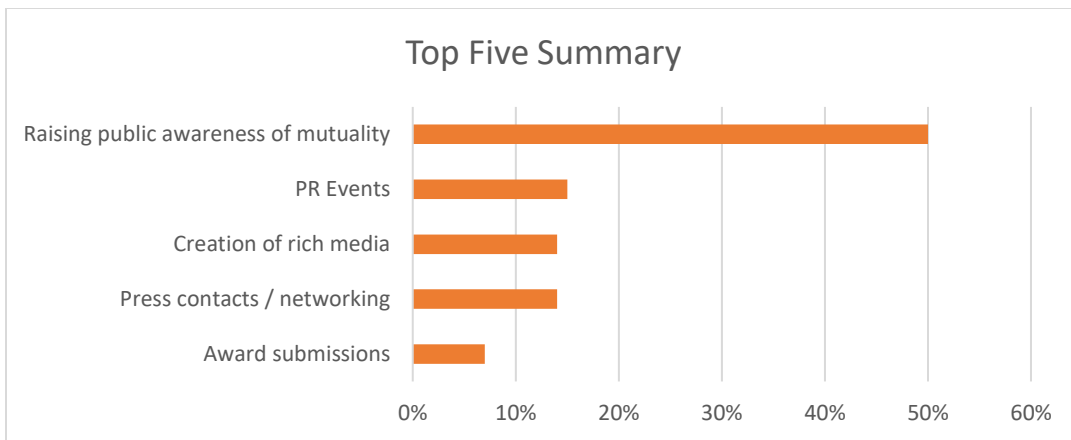
<ul style="list-style-type: none"> <li>• Use of office space for meetings;</li> <li>• “Mutuals” Kite mark / AFM Seal of Approval;</li> <li>• Quality Accreditation/Standards for all Members;</li> <li>• Advertisement by the AFM;</li> <li>• Promotion of what the AFM stands for – more information on what mutuals are about;</li> <li>• Negotiate better deals for collaborative training from agencies;</li> </ul>	<ul style="list-style-type: none"> <li>• Joint training;</li> <li>• Combined purchasing power;</li> <li>• Shared CPD modules;</li> <li>• Links from AFM Website to Member Websites;</li> <li>• Shared Best Practice;</li> <li>• Learning from each other / Review &amp; Discuss our Experiences / share challenges;</li> <li>• Joint Promotional activities;</li> <li>• Joint discounts and schemes</li> </ul>
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**Question 2: What do we want from an AGM Public Relations Partner?**

Areas where a PR firms could add value:

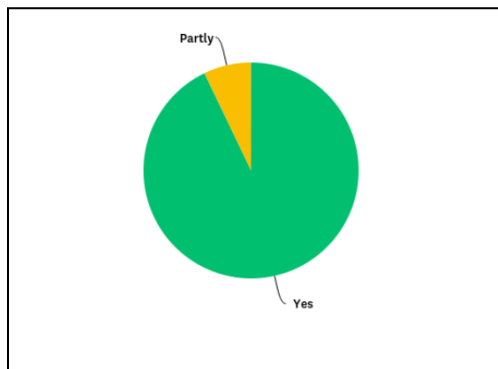
<ul style="list-style-type: none"> <li>• Raise Awareness of mutuality, sector and understanding;</li> <li>• Raise Profile of the AFM;</li> <li>• Encourage more Members to the AFM;</li> <li>• Help AFM to reach customers;</li> <li>• Multi-Media content: social media, display, visual, video, campaigns</li> <li>• Provide Market Insight/research;</li> <li>• PR Events to raise awareness of Sector;</li> </ul>	<ul style="list-style-type: none"> <li>• Sharing Press contacts / creating direct links for AFM Members to the press;</li> <li>• PR Tips/Guidance for individual AFM Members;</li> <li>• Putting AFM members forward for industry awards;</li> <li>• Regular Newsletter and Updates;</li> <li>• Crisis Management and presentation advice;</li> </ul>
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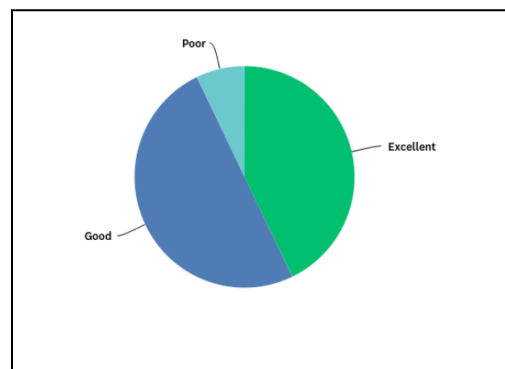
**Survey Monkey report**

14 responses were received by 11/09/2018, a summary of which is shown below:

Did the event cover what you expected?



How would you rate the venue?



### Additional comments about the venue

- Amazing outdoor space for the lunchtime breakout session.
- Venue was in an excellent location.
- Room was either too hot or too cold

### What aspects of the event worked best?

Word Cloud:

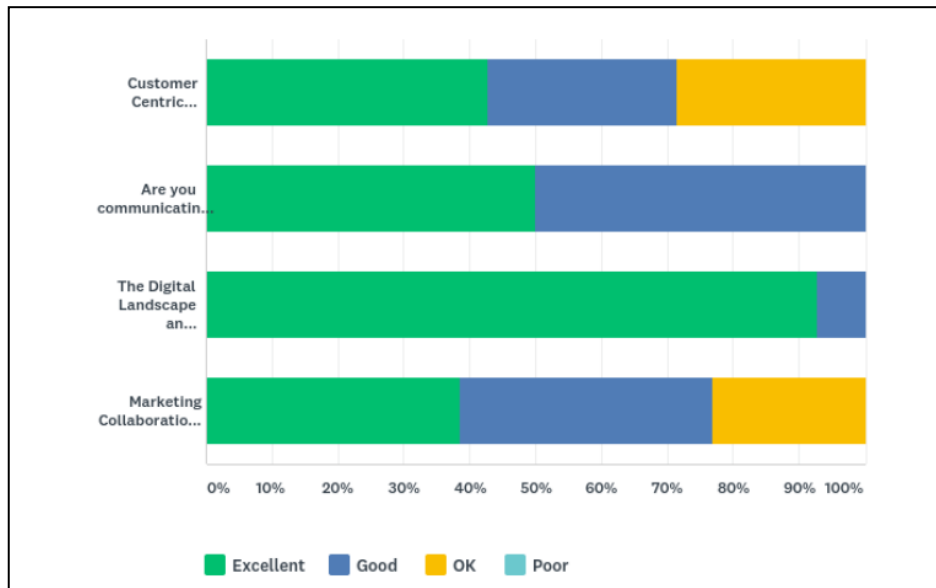


- Content being tailored to the specific needs of the audience. The fact that it was interactive and the audience was encouraged to contribute.
- I enjoyed the breakout sessions and the very informal workshop style approach by Hallam.
- Digital marketing presentation was great. Networking was useful. Sharing of ideas also very helpful.
- Excellent speakers and picked up tips on SEO, like MOZ, YOAST, Direct mail to different age groups
- Engaging presentations
- I thought it ran really well and all topics were very useful.
- The presentations from the 'experts' and the meeting of other Marketing professionals in the same industry. Location was good and easy to get to from Paddington.
- Timings - plenty of time to network, talks were the right length and all 3 very engaging.
- Enjoyed all external presentations, especially the afternoon session.
- All presentations were good and insightful. Level of interactivity was good - esp in the digital session.
- It flowed very well with a good mix of topics and some good speakers. Plenty of time to network and discuss.
- Format was good, shortish presentations with Q&A at the end
- Subject matters and the networking

### What aspects of the event could have been improved?

- I think for the first one of these forums it was very good. I like the idea of allowing feedback that will go towards deciding on the content of future events.
- The first presentation was a bit bland - I think the more interactive the session, the better.
- First presentation could have been made more relevant to smaller organisations. I believe we should make use of the opportunity to share and recognise best practice in marketing.
- Anonymous question system
- Sessions only half an hour?
- I would have been happy for the event to be longer with time for one more presentation.
- I thought the breakout session after the data/segmentation session was a bit forced. The session where I think there would have been lots of questions and have been too good to have a breakout session would have been the digital session from Ed Ryan but this wasn't possible
- I felt the Lethaby Room was noisy and not very conducive to holding presentations

## Rate the presentations



## What topics would you like to see covered at future Marketing events?

- One of the key things I would like to see is more on how we can become more customer-centric with our marketing, and also how we can use new technology to support our customer service/CRM activity.
- Just to name a few ideas for future topics: -social media engagement -google analytics -email marketing automation -more on segmentation by demographic -tips on making policy documents more customer friendly -omnichannel marketing
- Focusing on different marketing areas at each session would be useful. We should invite members to present/show off their best examples of marketing activities and invite feedback. Something like awards or some sort of recognition for being best in class would be great (e.g "Best marketing campaign"). Could we trial this in the sessions then consider how this might build into something for the Conference? Could it extend to best practice in other areas? This encourages us all to raise our game.
- Assessing the performance of social media campaigns.
- Copywriting advice, outsourcing freelancers where needed (such as blog or copywriters) to save time for small teams, Online advertising, talking to members, discussing mutuality with potential members and members, Reading and understanding Google Analytics, Keeping social media branding on point, anything is welcome really from my perspective!
- More experts, tips on copy-writing, press releases and award submissions, sharing of own experiences, promotion of mutuality and the benefits.
- Success stories. Processes/exercises being undertaken in organisations that have had positive outcomes or learnings worth sharing.
- Hearing from members about marketing challenges and how they've approached them - marketing issues specific to our industry eg getting the most bang for your buck, forming a voice for the industry
- Marketing transformations of mutuals- what have people done, what's worked, what is an ongoing process Data- how do people collect it, what do they do with it. Do they use it for prospecting,

cross sell, marketing, member engagement Who has set up a member engagement programme- how did they do it, what was involved, what has worked well, what would they change Social media- who is doing it, what is their approach, which ones are working well, key learnings/insight I'd be happy to present if there was a topic I have insight and knowledge on which members would find useful

**How often do you think AFM should hold a Marketing Forum?**

