

# MARKETING

*playbook*

ALL-IN-ONE CYBER SECURITY FOR YOUR AGENTS AND YOUR CUSTOMERS



# CONTENTS

THE VALUE OF CYBERFIN.....PG.2

YOUR BRANDED AFFILIATION SITE.....PG.4

GENERAL AWARENESS.....PG.5

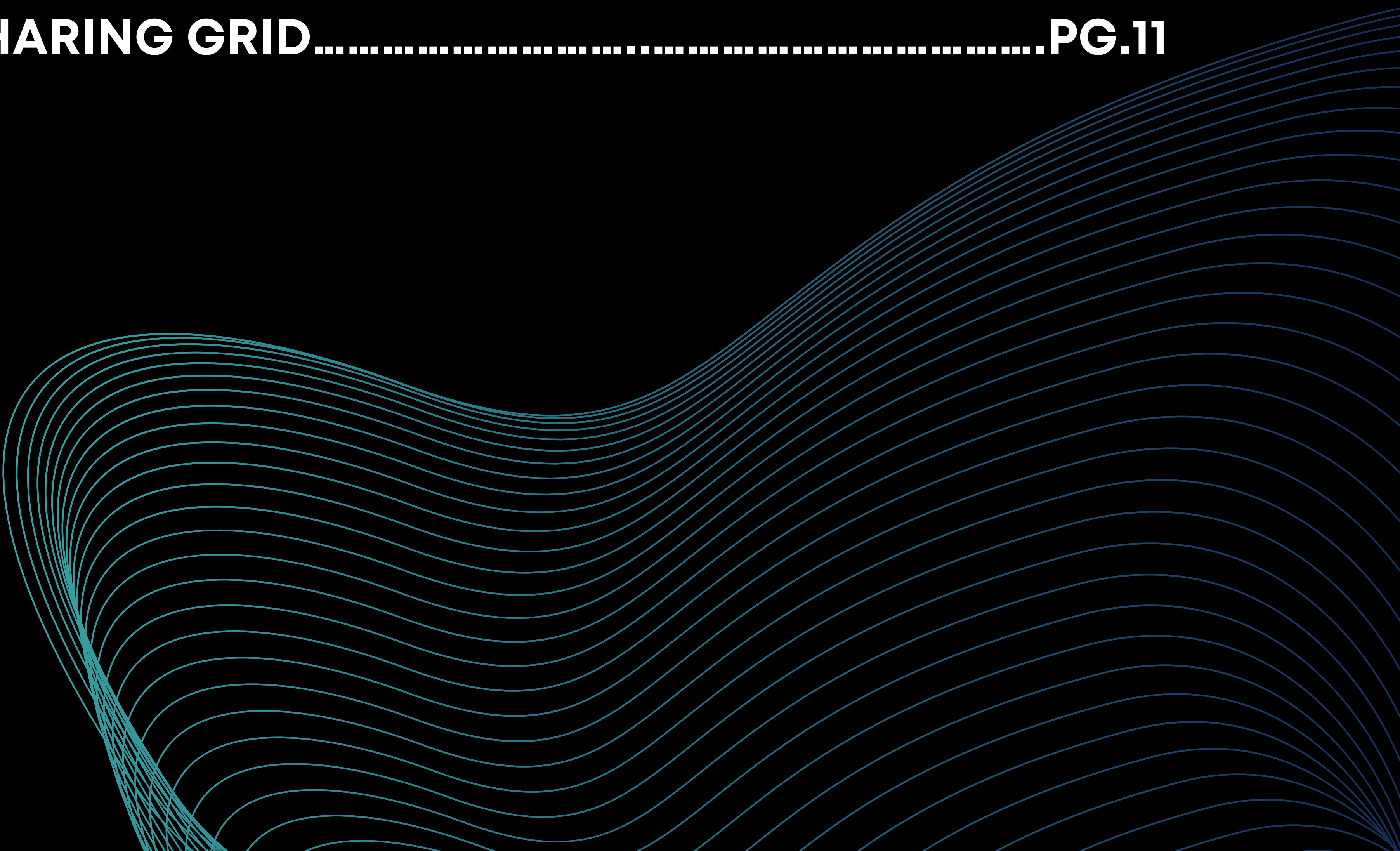
QUARTERLY EMAIL CAMPAIGN.....PG.7

TARGETED APPROACHES.....PG.8

LIVE GROUP WORKSHOPS.....PG.9

REVENUE SHARING OVERVIEW.....PG.10

REVENUE SHARING GRID.....PG.11



# THE VALUE OF **CYBERFIN**

## Benefits for **you**

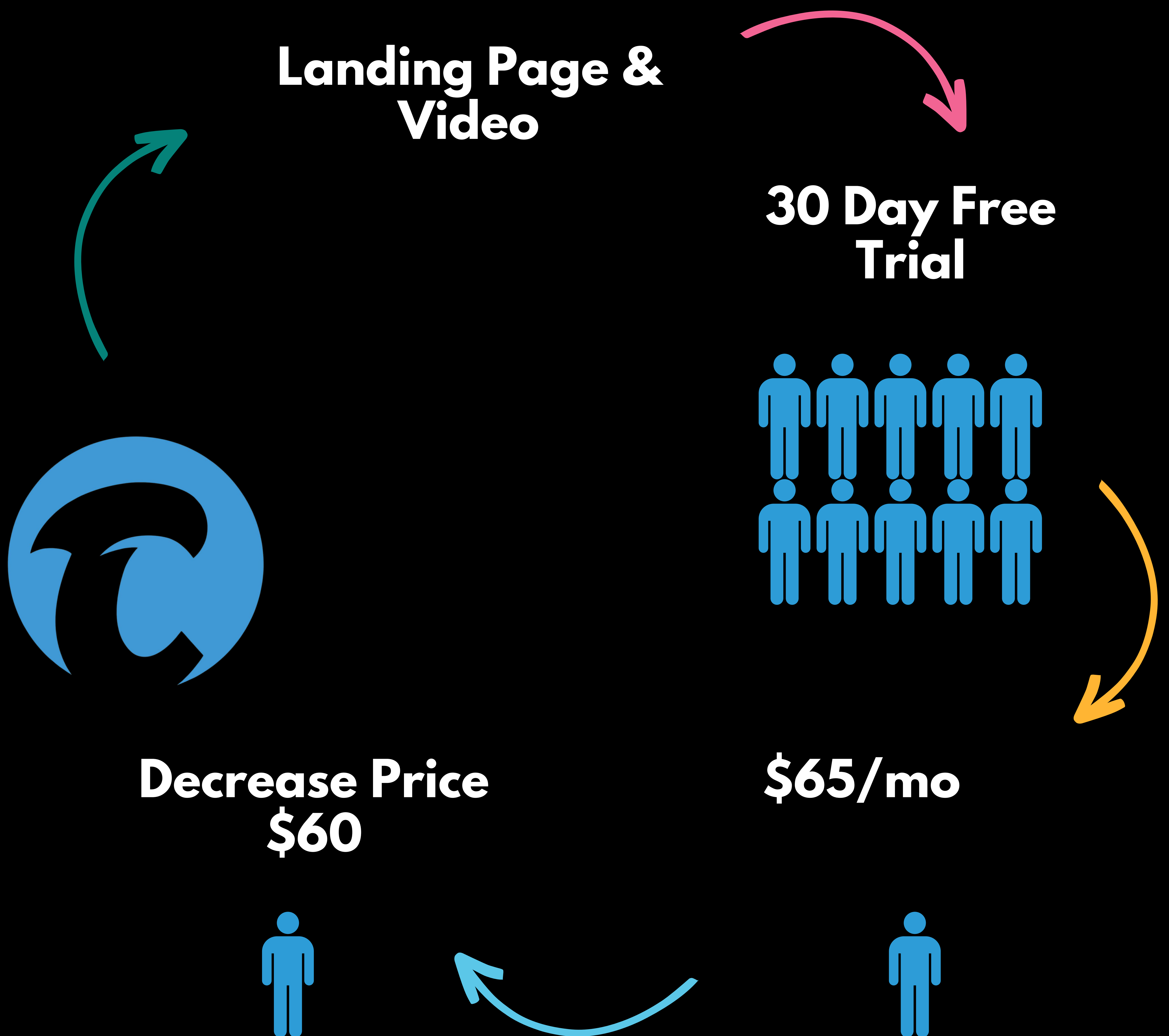
- 1. Help you bring additional value and something new to the Financial Advisors and Agents you work with.
- 2. Help the advisors protect themselves and you from cyber crimes and compliance fines.
- 3. Provide revenue sharing to your organization to support marketing efforts and Advisor incentives.

## Benefits for **your** Advisors

1.	Our Cyber Service <b>severely</b> lowers their risk of a financial disaster caused by a cyber crime.
2.	It <b>reduces</b> their cost by spreading out the labor amongst multiple entities and access to enterprise license pricing
3.	Removes the worry of lost <b>productivity</b> , 5 and 6 figure fines, law suits and sullied reputations.
4.	Added <b>value</b> to their customers and increased income
5.	30 - Day <b>Free</b> Trial. Discounted plan pricing \$60/mo. vs. \$65/mo. productivity.

# Affiliate Model


## The Strategy for Success



# Affiliation Site

The focal point to **all** marketing

**Your Affiliation Site Link:**  
**[www.cyberfin.net/lochloosa/](http://www.cyberfin.net/lochloosa/)**

- 1.** Give your Advisors a way to **instantly** see a short on-demand workshop of where they are most vulnerable, to what extent and what they need for protection.
  - 2.** Give your Advisors the ability to get **immediate** cyber security with the 30 day free trial from Cyberfin
  - 3.** Provide Advisors an overview of the **discounted** affiliation pricing they have available to them through Versatile Ins. Services.
  - 4.** Allows Advisors the ability to reach out **directly** to us (Cyberfin) for any questions or to set up 1-on-1 personalized demos.
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# General Awareness

## Marketing Strategy



**Place the affiliation site  
link on your website**



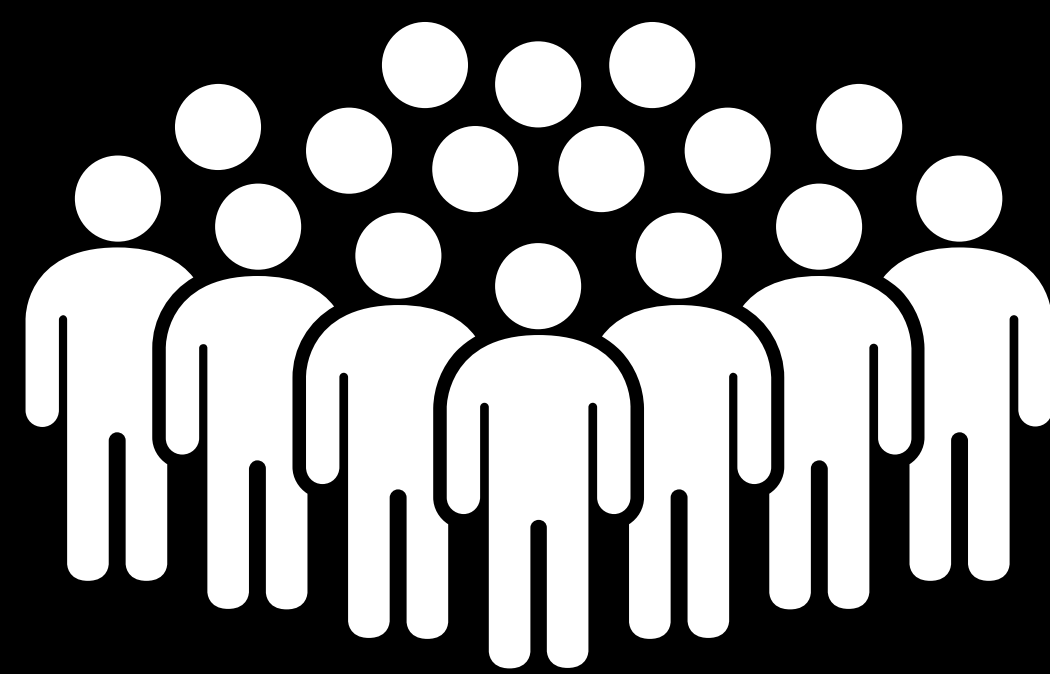
**Add the affiliation site link to  
your email signature with some  
potential verbiage**

*Example: Protect you, Protect us from Cyber Crimes and  
compliance fines. Click here to watch a short video how:*

*Example: Cyber Crime is the #1 Risk to your Agency in 2023!  
Click the link here to learn more: (Affiliation link)*

# General Awareness

## Marketing Strategy



**E-mail Introduction to all  
Advisors**

*Example Email Template:*

*Subject Line:* Introducing CyberFin

Advisor Name,

(Assigned to Paige)

# Quality Campaign

## Marketing Strategy

### Quarterly Marketing Drip Campaign

As a starting point, we recommend going with a quarterly marketing message campaign focusing in on “*The Four P’s of Cyber Security*”

This is usually a **combination** of a quick video highlight, along with email verbiage and/or screen shot visuals to bring the specific message and topic together.

#### 1.Positioning

This message shows advisors the risks of not being protected and the simple solution to get cyber security that doesn’t need to be managed their clients income, which helps immediately grab their clients attention.

#### 2.Problem

There is a lot of confusion about what Cyber security an agent or client needs. This message shows advisors how the software can help them effectively demonstrate their clients financial PROBLEM and mitigate or eliminate objections.

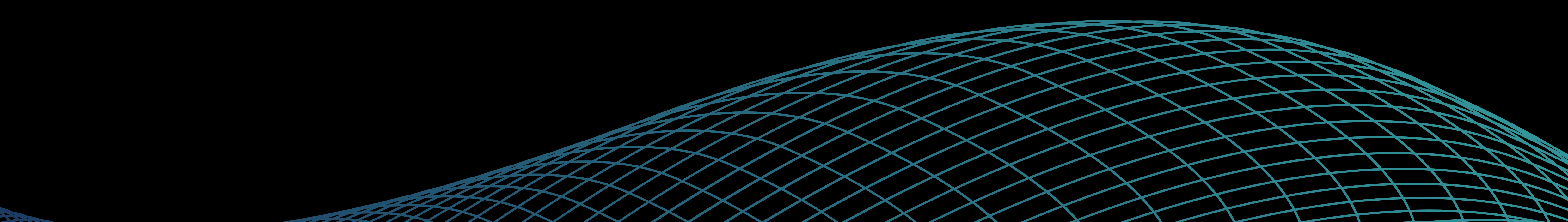
#### 3.Presenting

This message educates the advisors about cyber security and their risks that are out of their control.

#### 4.Perspective

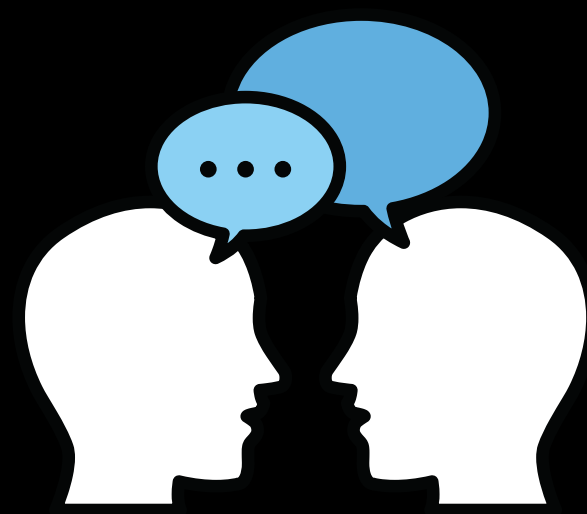
This message is all about how simple it is to become protected and compliant. Cyberfin has created a simple solution to protect them.

*\*Cyberfin provides the email verbiage and video overview links needed for emails that speak to Agents.*



# Targeted Approaches

## Marketing Strategy



### 1-on-1 Advisor Discussions & Introductions

One of the easiest and most effective ways to introduce the affiliation relationship and **CyberFin** is when quotes of case status are being sent. This sensitive data is being viewed on their computer.

You can easily direct them to or share the affiliation site link in this type of solution, but we find it works **best** to make an immediate email introduction to: [dm@cyberfin.net](mailto:dm@cyberfin.net) with that Advisor cc'd on the email.

*Example Email Template:*

**Subject Line: Cyberfin - (Advisor Name)**

*(Advisor Name) is interested in learning more about Cyberfin and how it can help assist on their Cyber security needs.*

*Please reach out as they would like to schedule a personal demo overview.*

*(Assigned to Paige)*

# Live Group Webinars

## Marketing Strategy



### Live Webinars for Specific Producer Groups

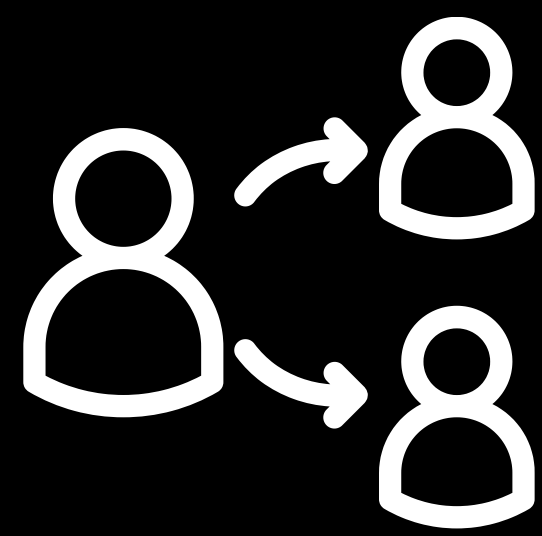
Another **effective** area to focus on is live demo events targeting **specific** producer groups or insurance agencies.

- For **larger** audiences (over 15) we typically recommend setting this up as a Zoom Webinar event.
- For **smaller** groups (15 or under) we recommend setting this up as a Zoom meeting for more interaction.
- Cyberfin typically provides **all** the content for invites and meeting links for you to send out and market.

*We can do these types of webinar events as much, or as little as you see fit*

# Revenue Sharing Overview

## Marketing Strategy



### Revenue Sharing Highlights

Of course, the core **purpose** of our Affiliation relationship is to help **protect** you and your Advisors from cybercrimes and fines related to lack of protection on both parts.

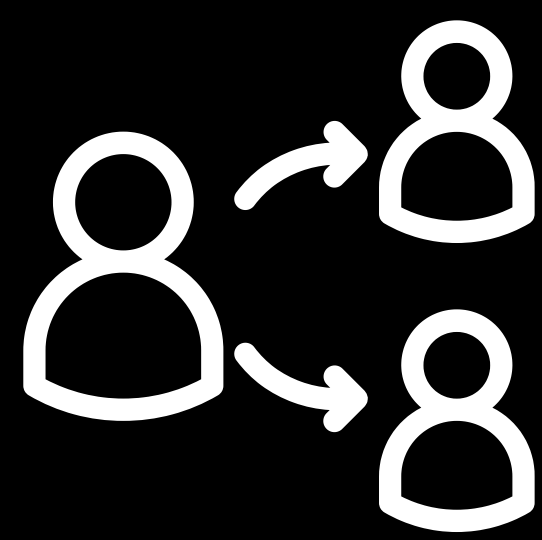
**However**, our revenue sharing component allows some additional dollars to help support your marketing efforts and/or Advisor incentives.

*Example:*

*This helps to further strengthen your key Advisor relationships and show them that you are helping cover all parts of their business.*

# Revenue Sharing Grid

## Marketing Strategy



### Revenue Sharing Grid Overview

*Revenue share percentages are paid **monthly** based off the Advisors monthly or **annual** subscription.*

# Next Steps

**Let's have an initial  
marketing strategy  
session to kick  
things off!**

