

Project Guidelines | Marketing

Marketing's goal is to stay progressive in a changing market while continually enhancing the service and support we provide our customers. We are constantly seeking new opportunities to increase sales and maximize retention. Our team has the experience, knowledge and skills to provide you exceptional communication tools to grow your business and exceed annual goals. We work with you to develop strategic marketing communications and determine the most effective way to distribute those to your customers.

When to submit a Project Request Form

The Project Request Form is **required** for the following:

- Brochures
- Presentations
- Advertisements
- *Enrollment Materials
- Pre-populated Applications
- Promotional Items
- ECR Proposals
- Worksite Proposals

*Enrollment Kits can only be requested for groups with: 20 -100 lives; voluntary group products; and face-to-face enrollments are not being offered.

When to submit a Creative Brief

A creative brief is **required** when submitting all **TIER 3** projects. A creative brief provides us with a road map to guide the project from inception to completion. The brief provides the designer with all project information, including goals, objectives and challenges that need to be overcome.

To download or order printed sales materials, visit yourdocumentcenter.com.

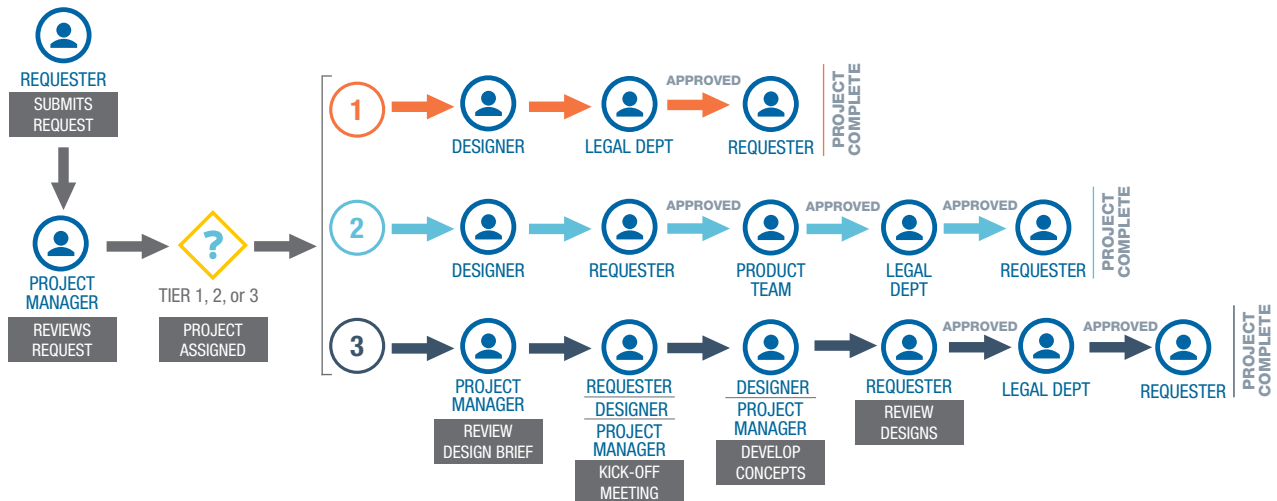
Approval process and turnaround times

While we will make every effort to meet deadline expectations, the average turnaround is **7-10 business days** (this includes dedicated time for quality assurance and legal review). Additional time may be needed depending on the nature of the request. Projects are assigned Tier 1, 2 or 3 based on the complexity of the project and amount of time needed for us to follow through. Tier 1 projects are the simplest and require the least amount of production time.

TIER 1 PROJECTS an existing piece that requires minor changes, for example, an image needs to be swapped out or basic type changes

TIER 2 PROJECTS based on an existing design, must include original with marked up changes

TIER 3 PROJECTS starting from scratch, must include a design brief





Project Request Form | Marketing

What can we help you with today? <i>(CHECK ALL THAT APPLY)</i> <input type="checkbox"/> Brochure <input type="checkbox"/> Worksite Proposal <input type="checkbox"/> Presentation <input type="checkbox"/> ECR Proposal <input type="checkbox"/> Advertisement <input type="checkbox"/> Other _____ <input type="checkbox"/> Enrollment Material _____ <input type="checkbox"/> Promotional Item _____	General Information Date Requested _____ Date Due _____ Name _____ Email _____ Phone _____ Group Name _____ <input type="checkbox"/> New <input type="checkbox"/> Existing Group Number _____ State(s) _____
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Products <i>(CHECK ALL THAT APPLY)</i> <input type="checkbox"/> Group Life/AD&D <input type="checkbox"/> Group STD <input type="checkbox"/> VAD&D <input type="checkbox"/> Accident <input type="checkbox"/> Hospital <input type="checkbox"/> Dependent Life <input type="checkbox"/> Group LTD <input type="checkbox"/> VSTD <input type="checkbox"/> Cancer <input type="checkbox"/> Dental <input type="checkbox"/> Supplemental Life <input type="checkbox"/> VGTL <input type="checkbox"/> VLTD <input type="checkbox"/> Critical Illness <input type="checkbox"/> Vision <input type="checkbox"/> Other _____	Services <i>(CHECK ALL THAT APPLY)</i> <input type="checkbox"/> Assist America <input type="checkbox"/> W-2 Services <input type="checkbox"/> EAP <input type="checkbox"/> TASC Section 125 <input type="checkbox"/> FICA Matching <input type="checkbox"/> FMLA <input type="checkbox"/> Enrollment Center <input type="checkbox"/> Other _____
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Brochure Is this a new brochure? <input type="checkbox"/> Yes ▶ Please complete the Creative Brief <i>(request from Marketing)</i> <input type="checkbox"/> No ▶ Please attach a current brochure with marked up changes	Enrollment Materials <i>Attach proposal or certificate and/or policy</i> <input type="checkbox"/> Rate Sheet <input type="checkbox"/> Benefit Summary <i>What frequency are ee's paid? _____</i> <i>50+ lives and at least one voluntary product</i> <input type="checkbox"/> Enrollment Flyer <input type="checkbox"/> Enrollment Kit <i>Enrollment Date(s) _____</i> <i>Complete the Pre-populated Application section</i>
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Presentations | Advertisements | Promo Items

Audience _____ Brand USAL FCL EBI YBA Other _____

Presentation What is your topic and core message? _____

Advertisement What is the publication, core message, ad size (full specs, with bleed, color/grayscale) and contact information _____

Promotional Item Do you have a suggestion or preferred item? If so, provide photo, item number, description, etc. _____

Date of Event _____ Date Needed _____ Qty _____ Budget _____ Cost Center _____

Pre-populated Application <i>Attach census and proposals (if applicable) - Not available for Worksite Suite</i> VGTL BENEFIT AMOUNTS <i>Enter benefit levels you would like displayed on the application</i> Employee _____ Spouse _____ Child(ren) _____	VAD&D BENEFIT AMOUNTS <i>Enter benefit levels you would like displayed on the application</i> Employee _____ Spouse _____ Child(ren) _____ Spouse rates based on employee age <input type="checkbox"/> Yes <input type="checkbox"/> No	Complete all appropriate fields and send to: marketing@lsvusa.com While we will make every effort to meet deadline expectations, the average turnaround is 7-10 business days. Additional time may be needed depending on the nature of the request.
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