|  |  |  |
| --- | --- | --- |
|  |  | **Project** Guardian Plan Campaign |
| **Date**  23/11/21 | **Project description** What are you doing and why?  Guardian Plan is a financial product which allows you to plan and pay for your funeral in advance. It is sold by InvoCare’s 40+ funeral brands. The customer meets with a funeral arranger and decides what they want and pays for it at today’s prices – protected from inflation. The money is held by the independent APRA-regulated Over 50s Guardian Friendly Society Ltd and released to the funeral home when the time comes. The family is saved the emotional and financial stress of arranging a funeral at a difficult time.  Guardian Plan has not really been marketed before. Instead, marketing has been for ‘White Lady Prepaid Funeral’, ‘Simplicity Prepaid Funeral’, ‘Le Pine Prepaid Funeral’. Now, we want to market the central product Guardian Plan, partly because it’s more effective to market a single brand, and partly because Guardian Plan gives customers greater choice than being tied to a particular funeral brand. The individual funeral brands then all sell Guardian Plan as a product. |
| **Department/Brand**  Guardian Plan | **Objectives** What is the desired outcome and why?  • To build awareness of the benefits of prepaid funerals.  • To build awareness of Guardian Plan as the leading prepaid funeral product. |
| **Project Code (if required)** | **Measurables** How will you measure the success of the work?  • Increase in website visits.  • Increase in the number of leads (people asking to discuss the product with a consultant). |
|  | **Target Audience** Define the audience. What do they think now?   * Australians in every state except NT aged 60+, and their children who can influence their decision (either by encouraging them to plan what they want, or by saying ‘don’t worry about that, Nan, we’ll look after it’). * Particularly, retirees since the asset test is a strong motivator. * People of middle wealth – not the top or bottom 20% - who are financially sensible and diligent. |
|  | **Creative brief** What is the most important message you need to convey and why?  What tone of voice do you want to convey?  There are rational and emotional benefits to pre-planning.  1. Pre-planning is financially sensible because:  • You pay at today’s prices, with no more to pay even if you don’t use the service for years;  • For retirees, the amount you pay is not counted in the asset test, so it may increase your pension;  • It saves your children having to find the money when the time comes;  • Over time, it may be cheaper than funeral insurance, and can’t lapse like insurance.  2. Pre-planning is emotionally rewarding because:  • The least stressful time to arrange a funeral is before it is needed – make it easier for your family, especially if there is likely to be tension/disagreement in the family;  • You can be sure your funeral will reflect your wishes.  3. Pre-planning funerals is becoming more popular because:  • More people want to celebrate life, rather than mourn death. Plan your final party;  • Conversations about preparing for end-of-life are becoming less taboo, thanks to charities like Violet Initiative and Groundswell Project;  • People are becoming more concerned with how they’ll be remembered, with the growth of services like memories.com.au and obituary writing. |
|  | **Assets** What logos and/or imagery should be used?  Write a description or insert link to stock image or Marketing media library   * Logo and colour per guardianplan.com.au |
|  | **Copy** Extract wording, with structure and pagination if applicable.  Attach in a separate document if preferred.   * See copy on guardianplan.com.au and [guardianfunerals.com.au/planning-ahead/](https://www.guardianfunerals.com.au/planning-ahead/) - you can rewrite |
|  | **Mandatories**  Eg. Call to action, contact, website, logo or T&Cs   * Visit guardianplan.com.au |
|  | **Usage**  What mediums or application will be used?  • Print ads, advertorial and digital banner ads suitable to run in the following media:   * Seniors’ media (Starts at 60, Your Life Choices, The Senior, Life Begins At) * Financial advice media (financial section of AFR, Sydney Morning Herald etc) * Lifestyle media (Daily Telegraph Body & Soul magazine, Good Weekend) * Programmatic targeting defined audience     • Collateral:   * New website imagery and copy * DL brochure * Poster for funeral homes   • Happy to hear radio and TVC scripts, if that’s part of the course. |
|  |  | **Challenges**   * Now that social media is an important channel, you can’t just create one winning ad and run it repeatedly. Need creative variety for Facebook and different channels. * How do we step people through the stages: thinking about what they want for their funeral, discussing it with family, consulting a professional funeral arranger, paying for it to lock it in? * Research says that many people think this would be a sensible thing to do but they put it off because it’s awkward to discuss or they think it will be a lot of work. How can we trigger actually doing it, not thinking it’s something you might do one day? * The funeral arrangers are used to selling a prepaid funeral for one brand. We want them to start selling Guardian Plan from White Lady/Simplicity/Tobin Brothers etc. Therefore, we need to communicate that Guardian Plan encompasses many funeral brands. * There is strong competition from funeral insurance, Bare Cremations, Tobin Brothers in Melbourne etc. |

Brief

MARKETING BRIEF

Complete this brief in full. If the collateral required uses existing material, 3 business days is required.

If it requires a new concept, 8 business days is required.