

## A simple guide to promoting BankLink

Below is a simple guide to help you with direct marketing mail outs to clients. BankLink is happy to supply the following documents to you:

- Template client letter for you to personalise
- BankLink brochures and fact sheets for the different client tools
- Client Authority Forms (CAFs)

Week	Step	Key task
1	1	Identify clients who may be suitable for BankLink (eg. clients who use off the shelf accounting packages, or those who use cashbooks or excel spreadsheets that you have to do manual data entry for) <ul style="list-style-type: none"> <li>• You can export your list of clients from your Practice Management System</li> <li>• Import this list as prospects into BankLink Practice</li> </ul>
	2	Personalise the template letter supplied by BankLink
	3	Merge your personalised letter and client list that has been created
	4	Mail out or email the letters with a brochure, fact sheet, completed CAF with the clients bank details and self addressed envelope
	5	Inform employees of mailing going out and who the contact is for any queries
2 - 3	6	Collect and record all CAFs received and send them to BankLink <ul style="list-style-type: none"> <li>• You can create client files in BankLink Practice from the prospects who return their CAFs</li> </ul>
3	7	Follow up call after about 10 working days of mailing, to those who haven't returned their CAFs – find out if they are interested and if they need any more information
4	8	If running a competition to encourage CAFs to be returned, allow 2 - 3 weeks for forms to be returned before picking the winner

### Other marketing opportunities

If you would like to promote BankLink to your clients in other ways, we would be happy to supply you with any of the following:

- 'We recommend BankLink' logo
- Online animated presentation tool that explains how The BankLink Service works
- BankLink overview – copy for use on your website or in newsletters
- Advert copy for local papers
- Powerpoint presentation slides – overview of BankLink for use in your reception area
- Signage, posters, stickers – give us a call to discuss what is available

We would be interested in hearing the results of your campaign.

Thank you for your interest in BankLink. If you would like any further assistance, please contact us on **1800 123 242**.