

Leveraging value through communication touchpoints



Who is this guide for: Advisers to use as a resource when engaging their clients

What is the aim: To help guide client conversations

Note: Let us know if you'd like to localise any of these sample scripts for your market

Engaged clients offer greater up-sell and cross-sell opportunities and increase the quality of referrals. Leveraging this effectively can help to **generate organic growth** for your business – at the same time as building a strong relationship between you and your client.

Keep in contact with your clients

Traditional insurance often means limited opportunities for post-sale interactions with your clients. **With us, this is different.**

The big advantage of our Vitality partnership is that we offer relevant moments of communication and conversation between you and your clients as you support them on their health and rewards journey. An added bonus is that with us, these moments of interaction can be lighthearted and enjoyable.

What this means is that you have more opportunity to engage with your clients regularly so that you get to know each other better and form a stronger long-term bond.

Some of these conversations include:

- + Guidance on the programme, earning points and moving up in status
- + Relevant and personalised Vitality benefits that align best to their lifestyle
- + The range of rewards and reward partners that they have access to
- + Accessible health and wellbeing information with tips to improve their health
- + Published Vitality research in the health and wellbeing space



Vitality's culture of innovation also means that there are new and exciting benefits and rewards on a regular basis to add interest and help engage clients and their families.

Strengthen the adviser-client relationship

By leveraging Vitality as a conversation enabler, you're also able to position yourself as a thought leader – elevating your role as a trusted adviser in a client's life.

As part of this guide, we highlight **key conversation touchpoints with demo scripts** to help you navigate client outreach.

1 Download and register on the app

There is an opportunity for you as the adviser to help introduce your clients to Vitality once the app has been downloaded and they have registered.

Sample comms

- **Hi <Client Name>, well done for downloading and registering on the Vitality App!** You've taken the first step to a healthier life. I'd love to take you through some of my favourite app features and show you how easy the app is to use – let me know if you have some time this week and I'll set up a quick call.

2 Earn rewards

Incentives are a critical part of positive behavioural change. When members earn their first rewards, you can use this as an opportunity to congratulate them and advise them on additional benefits.

Sample comms

- **Hi <Client Name>, well done on earning your first Vitality reward!** I'll be in touch to show you how you can continue being rewarded for living a healthier life.
- **Congrats on earning your first Vitality reward, <Client Name>!** Vitality is all about rewarding you for taking steps to improve your health. Let me show you how you can earn even greater rewards.

3 Vitality Health Review

When clients do their Vitality Health Review, they are given their Vitality Age. This creates an opportunity to check in and see if they have any questions.

Sample comms

- **Congrats on completing your Vitality Age, <Client Name>!** This is a great next step on your health and wellness journey with Vitality. I'd love to talk you through your results and see how we can help you improve your health metrics – let me know if you have some time this week and I'll set up a quick call.
- **You've taken an important step in your wellness journey** by finding out your Vitality Age – well done <Client Name>! I'll be in touch to set up some time to take you through the benefits you have now unlocked.

4 Registration for Active Rewards

Active Rewards is one of the most popular benefits on our programme. Here, members are rewarded for getting active and achieving their fitness goals.

Sample comms

- **Get active, achieve your goals – and get rewarded!** <Client Name>, let me show you how you can maximise your health and your benefits by consistently achieving your fitness goals.

5 Fitness apps and devices

Vitality members get access to device benefits which, in turn, help them track activity and earn points towards their Vitality status. This is a great opportunity to reach out to your clients to discuss the benefits of wearable tech.

Sample comms

- **Hi <Client Name>.** Did you know that Vitality members get discounted access to fitness devices? Let me help you choose your favourite and activate this for you.

6 Vitality Health Check

The Vitality Health Check is a simple and convenient set of essential health screenings and preventative tests that can help clients best manage health risks across measures such as body mass index (BMI), blood pressure, blood glucose, cholesterol and smoking status.

Sample comms

- **Hi <Client Name>, remember to complete your Vitality Health Check to earn points!** Let me know if you need help booking yours and I can take that off your hands.
- **Congratulations on completing your Vitality Health Check <Client Name>!** I'd love to share more ways for you to get healthier, earn points and get rewarded.

7 Achievement of Gold Vitality status

Members who reach Gold Vitality status are highly engaged in the programme. This provides the ideal opportunity for you to up-sell or cross-sell to your client or ask them for a referral.

Sample comms

- **Congratulations on reaching Gold Vitality status <Client Name>!** This is a significant achievement in your health and wellbeing journey. I'd love to chat to you about anyone else in your life who could benefit from the Vitality programme.
- **Well done on taking care of your health and becoming a Gold Vitality member <Client Name>!** With great achievement comes great reward – and I'd love to chat to you about what you can now access as one of our top Vitality members.

8 New Vitality products

Vitality's regular product refreshes and innovation cycles provide simple reasons to reconnect with your clients.

Sample comms

- **Did you hear about the new <Vitality Benefit>?** These exciting new features offer new ways to earn points, making Vitality more rewarding than ever before. If you need help to understand these updates, and how they benefit you, please let me know.
- **Hi <Client Name>!** Vitality has recently partnered with <Brand>, offering new and exciting rewards for getting healthier. Want to explore this more? Let's connect!

These are just a **few of many ways to reach out to talk to your clients** – get in touch if you'd like us to share more examples across the full sales, onboarding, engagement and retention journey.