

cafi **iii**

**The Canadian Association of
Financial Institutions in Insurance**

In 2019 We...

Produced 3 Videos To Enhance Products on Website
Appeared In 2 Google Featured Snippets
Optimized Products to Increase Consumer Engagement
Expanded Consumer Examples for Search Visibility

In 2020, We Will...

Develop New Video Content

Continue Answering Top Consumer FAQs

Continue To Improve Your Website Engagement

Continue To Maintain And Enhance Your Website

Provide Clear & Insightful Reports On Wins and Growth Opportunities

New Video Content

Building On Last Year's Success

This year, we will be producing additional (EN,FR) videos for CAFII. Topics have been selected based on the impact creating a video will have on your rankings and engagement. Our recommendations are the following:

- Credit Card Protection Insurance
- Payment Protection Insurance & Loans
- Trip Cancellation & Interruption Insurance

We can produce all three of these videos in a whiteboard format (as per your other videos), or can produce two of the three in motion graphic format.

An example, as well as Pros and Cons of each can be found on the following slide.

Video Process

Script:

1. Outline of Key Messages (CAFII)
2. Draft
3. Revision
4. Final Approval
5. French Script

Video Creation:

1. English Storyboard
2. Draft 1
3. Revision 1
4. Draft 2
5. Revision 2
6. English Final Approval
7. French Creation
8. Revision 3
9. French Final Approval

Video Examples

Motion Graphic vs. Whiteboard

Motion Graphic



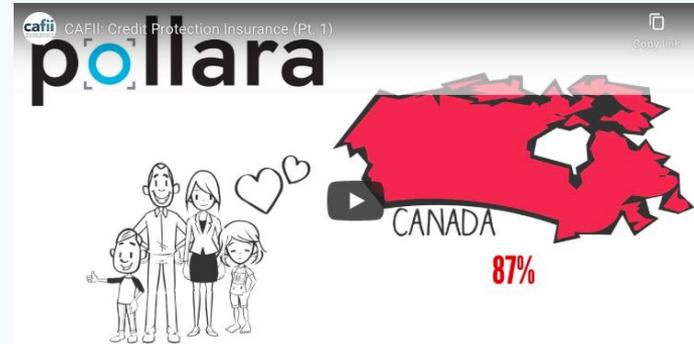
Pros

- More customized
- Branded
- Higher production value

Cons

- Higher Investment
- Inconsistent with previous videos delivered

Whiteboard



Pros

- Cost effective
- Consistent with previous videos delivered

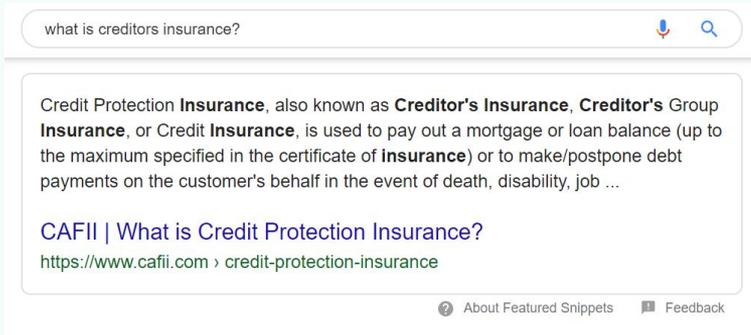
Cons

- Less ability to customize video elements
- Style of video is becoming out-of-date

Providing More Answers

New FAQ Content

Last year, Google began to recognize CAFII as the MOST AUTHORITATIVE resource for some of your consumers most frequently asked questions. As a result, answers from our website were pulled into the knowledge panel as featured snippets, as shown below.



This year, we're going to continue forward with the strategy that produced such fantastic results in 2018 and 2019. We'll be focusing on two topics which we believe you have an opportunity to become the online authority on and will be developing 3 new FAQs in total.

Mortgage Life Insurance:

Q: Who can apply for mortgage life insurance?

Q: I have other life insurance, why do I need this protection for my mortgage?

Travel Insurance:

Q: What is travel insurance?

Website Engagement

Creating Additional Vignettes

Last year, as part of a website engagement program, the team went to work adding interactive vignettes to the website in an effort to help consumers better understand the information we were providing. In short, it worked. We saw record highs in the number of pages that were viewed per session as well as the amount of time consumers spent browsing the website!



Anne-Sophie and Mathieu, who have two children, have been approved for a \$250,000 mortgage to purchase a home. Anne-Sophie is the primary income earner, and the family's ability to make their mortgage payments is largely dependent on her income.

Peace of mind and predictability of expenses are important for Anne-Sophie and Mathieu, so they purchase Mortgage Life Insurance for Anne-Sophie, which will pay out the balance of their mortgage (up to the maximum specified in the certificate of insurance) in the event of her death. They like the fact that their premiums will not change over the life of their mortgage, which means that they are not exposed to higher costs for this coverage as Anne-Sophie ages or possibly develops health issues.

They also like the fact that the proceeds of her mortgage life insurance will go directly to pay out the mortgage balance rather than possibly being used to pay other debts. It's important to Anne-Sophie that her family will be able to continue living in their family home, without financial duress.

[See FAQ section for more information](#)

This year, in addition to creating vignettes for each of the new FAQs we will be developing, we will also be creating an additional 3 for pre-existing pages.

New FAQ Vignettes (3):

Q: Who can apply for mortgage life insurance?

Q: I have other life insurance, why do I need this protection for my mortgage?

Q: What is travel insurance?

Vignettes for 3 existing FAQs:

Q: Is there a maximum amount of mortgage balance I can insure?

Q: If I purchase Mortgage Life Insurance, why doesn't my premium decrease as my mortgage balance decreases?

Q: Does Credit Protection Insurance provide good value?

Website Development Retainer

Why It's Important & What to Expect

Support your program needs.

You require a small retainer to support the initiatives proposed in your 2020 program.

Suggested Retainer	Monthly Investment
2 hours per month	\$300



Benefits:

- Team consistency and efficiency
- Discounted rate

Details:

- 2 website development hours per month
- Web projects falling outside retainer to be quoted at hourly rate of \$150/hour

This retainer will cover:

- FAQ Page Development
- Embedding Videos
- Vignette Deployment on Website
- Maintenance & Updates
- Website hosting for 2020

2020 Program Summary

What's In-scope?

Program Inclusion	Details
Video Production	6 Whiteboard (3 Eng. + 3 French) OR 4 Motion Graphic (2 Eng. + 2 French) Videos
FAQs & Vignettes	Development of 3 New FAQ Pages Development of 6 Vignettes (3 for Existing Pages, 3 To Go Along With New Pages)
Website Retainer & Hosting	12 Months of Hosting Up to 2 Hours/Month of Web Support (Includes the Development of New FAQ Pages, Embedding Videos, And Adding Vignettes)
Reporting & Communication	2 Performance Reports (June, December) 2 Executive Presentations For BoD 2021 Strategy
\$32,000 + HST	