

# Reinventing The **Fraternal Brand**

April 25, 2022 ~ American Fraternal Alliance

# Our Journey

## Phase 1

Is there a there there?

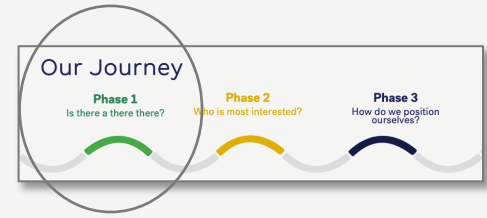
## Phase 2

Who is most interested?

## Phase 3

How do we position ourselves?





# A Fraternal Brand

# Is There A There There?

## Key Takeaway

**POSITIONING**

For financial decision-makers who want to make a difference in the lives of others, fraternal benefit societies are not-for-profit life insurance companies that offer competitive products, plus they reinvest their profits to fund social activities, community involvement opportunities and other benefits for their members.

## WHAT WE'VE FOUND

Uniqueness	61%
Believability	52%
Fills a Need	38%
Easy to Understand	63%
Tells Me Something New	72%
Positive Purchase Interest	49%

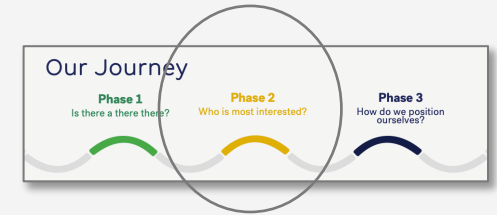
% Top 2 Box Scores

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30 MD

# A Fraternal Brand

# Who Is Most Interested?



## Key Takeaway

### Understanding Fraternal Benefit Society Customers

**Segment A**  
Open-minded, spontaneous givers, wishing to do more.  
Currently making efforts for their community but many feel like they only do the bare minimum.

- Feel a strong and growing sense of belonging with their community
- Open to trying to new things, including owning more types of insurance. Especially likely to buy from a FBS, as they make efforts to support companies doing good for the world
- No religious affiliation

**Segment B**  
Community-focused, savvy, committed.  
Generous and informed, ensuring their time and money are always well-spent.

- Already go above and beyond for their community and still constantly seek to do more
- Strive to make personal decisions and transactions that are aligned with preferred causes (a key way they differ from Segment E, who on the surface appear similar)
- Advocates and influencers, actively getting others involved in the products, services, and causes they support

**Segment C**  
Busy, social, looking for easier ways to give and be involved.  
Community is important but has to be a low priority for now.

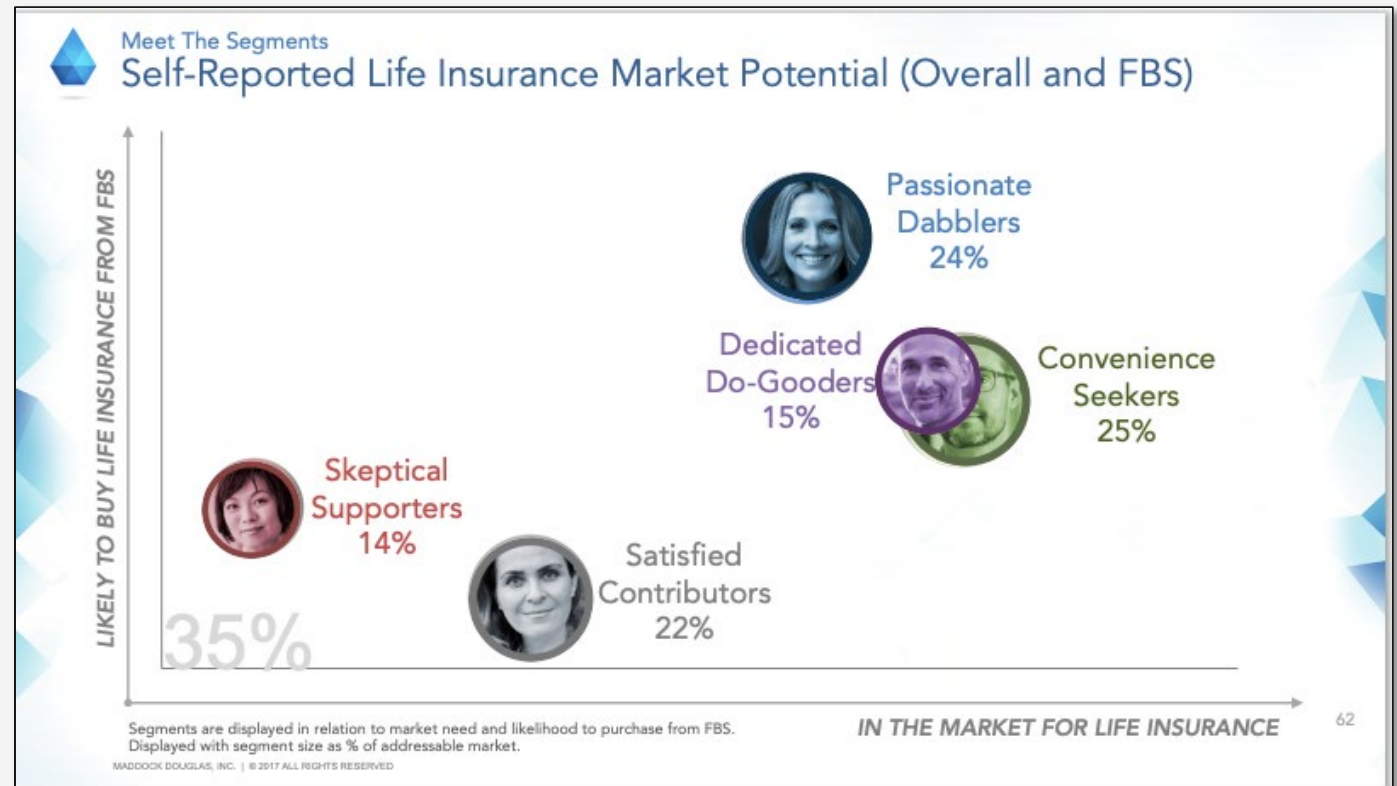
- Feel they just don't have excess time to invest in their community
- Tend to look for name brands and lowest prices when it comes to companies and products
- One of the two most religious segments

**Segment D**  
Introverted, price-driven, less trusting.  
Less concerned with their community and skeptical of the efficacy of charitable organizations.

- Not likely to be in the market for life insurance and tend to be more price-driven
- Community involvement is not a priority, now or in the future
- Reluctant to support companies who do good things, likely because they are skeptical that organizations actually do what they claim

**Segment E**  
Generous, religious, traditional.  
Giving back to community is deeply important, but they do not seek to do so via the businesses they support.

- Have strong community ties and volunteer their time and money regularly
- Tend to prefer to separate charitable giving and personal business decisions
- Evaluate life insurance decisions almost solely based on the quality of the company, and don't tend to share their opinions on products and services with others

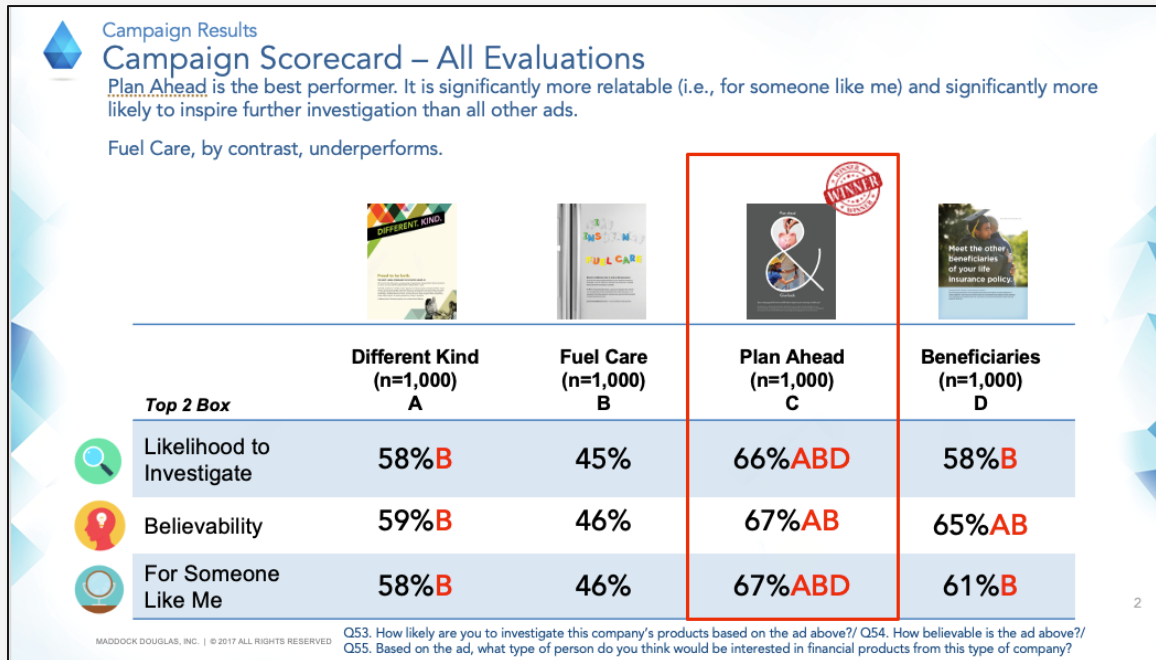


## A Fraternal Brand

# How Do We Position Ourselves?



### Key Takeaway



**HOW THE BRANDING CAMPAIGN CAN BE USED: Society Marketing**

- 1) EASIEST:** Add your society logo to the developed campaign
- 2) MODERATE:** Adjust the campaign to reflect **your society**
- 3) CUSTOM:** Integrate into **your own brand** campaign

MD 2

A Fraternal Brand

# Where Are All These Assets?

Key Takeaway

The screenshot shows the top navigation bar with the American Fraternal Alliance logo and links for HOME, ABOUT, ADVOCACY, EDUCATION, MEMBER SERVICES, and CONTACT. Below the navigation is a dark red header with the text "Branding Education". The main content area contains a paragraph explaining that the page lists upcoming education opportunities for the branding program. Below this is a section for "Webinar #1 Introduction | December 11, 2017" with a video player showing a webinar slide titled "Branding 1 DEC 11, 2017" and a "Date: December 11, 2017" label. A "PowerPoint Slides" link is also visible.

<https://www.fraternalalliance.org/branding-education/>

The screenshot shows the top navigation bar with the American Fraternal Alliance logo and links for HOME, ABOUT, ADVOCACY, EDUCATION, MEMBER SERVICES, and CONTACT. Below the navigation is a dark red header with the text "Brand Library". A "Watch on YouTube" button is visible. The main content area features a "PowerPoint Presentation from 2017 Annual Meeting" link. Below this are five dark red buttons arranged in a grid: "Brand Creative Assets", "Brand Research Reports", "Brand User Community", "Brand Education", and "FAQs".

<https://fraternalalliance.squarespace.com/fraternal-brand-users-group-page>

# Our Journey - Recap

## Phase 1

Is there a there there?

**YES!**

## Phase 2

Who is most interested?

**Roughly 13  
million HH**  
(in 2017)

## Phase 3

How do we position  
ourselves?

**In the &**  
(Community Plus Insurance)



# A Few “Live” Case Examples





**THE BIG QUESTION...**

**Q. How have these attitudes shifted in a post-pandemic environment?**



**A. Let's discuss!**

## INSIGHTS

# A Few Relevant Trends

Post-Pandemic Realities:




**Be Careful What You Wish For - Mortality Is Now A Dinner Table Conversation**

Relevance...More, Less or The Same?

# What Do You Want To Know?

Your Curiosities

- + Overall Messaging?
- + Target Characteristics?
- + Refreshed/Repositioned Offerings?
- + Implementation Considerations?
- + What Else?



LET US “NOODLE” :)



Maddock  
Douglas