

Template Email to Send to New Clients after First and Second Appointment

Subject: Welcome to Genistar and Vitality

Hi _____ and _____,

It was really great to spend time with you over our last two sessions.

I've attached some information about your Vitality plan for you to look over. Your policy and membership details will follow directly from Vitality.

Please have a look at the two videos below, which will help you get started on your activity, rewards and policy benefits. If you do not have a recommended activity tracker, there are multiple discounted options for either IOS or android through Vitality.

- Getting Started with Vitality: <https://www.youtube.com/watch?v=nnRhqvs3wak>
- Journey to Platinum: <https://youtu.be/bpR4cbQtHw8>

Someone from Vitality will call you within 30 days to explain the benefits of your policy. They will NOT try to sell you anything.

If you need further help in getting set up on vitality, please don't hesitate to reach out to me at any time, or call Vitality Membership Rewards Team on 03456023523.

PS Please be aware that there are a lot of phishing scams out there that are causing many problems. If anyone calls you saying they are from Vitality and they want to give you something cheaper or sell you additional products, IT IS A PHISHING SCAM. Vitality will NOT call to offer lower premiums to anyone.

These phishing companies will remove benefits from your policy to bring the price down which affects your level of protection. DO NOT GIVE THEM ANY DATA or PERSONAL INFORMATION as they may sell your data on to other companies.

If you ever get a call, please take down the caller's name, department, phone number and company, then call me straight away. I am here to support you and you can contact me anytime on _____ or my PA, _____, on _____.

Your name,
Title



Tel: _____

Email: _____

Web: www.genistar.co.uk

Why Genistar? <https://youtu.be/R4ozP-EhzP4>
Our Story - <https://www.youtube.com/watch?v=AtH5tlqD2jc>

NOTES TO REPS:

HOW TO LINK URLS TO WORDS:

Example: Instead of Website: www.genistar.co.uk you can have: [Website](#)

- Copy the url
- Highlight the words you want to link
- With words highlighted and cursor on them, right click. A list should appear. Click LINK.
- In the box that appears, paste your url and click OK.
- Now your words will appear as a hyperlink and are clickable.

GENISTAR LOGO

Make sure you have the correct Genistar logo in your email signature. You can download the correct logo and watch a video about how to add it to your email signature here: [https:// infohub.genistar.online/resources/professionalism/](https://infohub.genistar.online/resources/professionalism/) or find it on: *Info Hub > Resource Library > Professionalism.*

ATTACHMENTS

You can attach the following documents:

- Discounts and Rewards with Vitality Life
- Getting Started with Vitality
- Why vitality life serious illness cover
- Income protection
- For each client, attach ESD/Quote
- For PMI clients you can include the video: Managing Your Healthcare with Care Hub - <https://www.youtube.com/watch?v=YjiwVKWnf2A>