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A cost-effective ISA marketing campaign in four steps

ISA
Contribution
Report User
Guide

 Adviser Solutions



Four steps to ISA heaven

The ISA Contribution Report, which is part of a range of reports available from our Reporting Services, can help you create powerful and cost-effective marketing campaigns that will help your ISA sales activity. In addition, the report can help you demonstrate and meet the FCA's monitoring and reporting requirements for treating customers fairly (TCF).

The reports are supplied in CSV or TSV format (comma separated values or tab separated values) which can be read by most database and spreadsheet programmes. All you need to carry out the marketing campaign are a spreadsheet and word-processing programme (we use Word and Excel in our guide) and access to our Reporting Services.

Key benefits of requesting an ISA Contribution Report

Identifies clients who have opened an ISA but have not utilised the full allowance in their ISA linked to your agency.

Identifies clients linked to your agency that have yet to open an ISA in the current financial year

Generates data for marketing mailings to your customers to ensure ISA allowances are being effectively used

Reports can be run daily, weekly, monthly and quarterly

Includes unwrapped collectives/cash holdings which could be moved to an ISA

Do you have access to Reporting Services?

All of our reports, including the ISA Contribution Report, are delivered through our online Client Management system. This ensures that your company's confidential data remains protected at all times and allows you to control who in your organisation can have access to it.

To get access to Reporting Services, each user at your company will need to have a User ID and PIN. If you have a problem logging in, please call **0800 41 41 81** or visit the Reporting Services pages at <https://adviserservices.fidelity.co.uk/our-services/reporting-services/> We will email you a confirmation when the reports have been set up.

Do you know which of your clients have utilised their full ISA allowance?

One of the great opportunities of the ISA Contribution Report is that you can now identify which of your clients have not utilised their ISA allowance for the year. With this vital information you can start to plan a successful ISA marketing campaign.

Setting up your campaign

There are **four steps** you need to follow to set up your marketing campaign. If you have any questions about this process, or about running a marketing campaign using our Reporting Services, please call us on **0800 41 41 81**.

Step one

Get your data

To do this you need to log into Client Management.

Select 'Firm' on the left-hand side

Then select Reporting Services

At this point all you will be able to see is your available reports. You need to find the ISA Contribution Report and then click the download button

If the report is not readily available for you, please click on 'Request a Report' at the top of the page and follow the steps.

Step two

Manage your data

Once you have received your ISA report, you need to move it into an Excel file on your desktop.

Press Control (Ctrl) + A to highlight the entire spreadsheet

Go to the "home" menu on the top line and select "copy"

Open a new Excel workbook

Go to the "home" menu on the top line and select "paste"

You will now have an ISA Contribution Report on your desktop. In this example, save it as "ISA Campaign"

Helpful hint

If there is more than one adviser in your firm, you could filter the data by "Adviser number" and then exchange the numbers with the adviser names.

Step three

Create your marketing letter

When you write your letter in Word, or if you use a previously created one, the important thing to remember is that we will add "fields" into it at the next stage which will hold the data from the spreadsheet.

Step four

Merging the data

Merging data from an Excel file into Word is reasonably simple if you use the "Mail Merge Wizard", but it requires a bit of patience. First of all, you need to open the Word document that you have created. Go to the "Mailings" tab on the top line, select "Start Mail Merge" and then "Step by Step Mail Merge Wizard".

Now you just need to follow these instructions:

1 – Starting document

This should be set to "Letters".

2 – Document choice

This will be the current document, which is the marketing letter that you have opened.

3 – Select recipients

You need to choose "Use an existing list" and then browse to the Excel file you've saved, which we called "ISA Campaign".

4 – Write your letter

You can edit and make changes to the letter here if required.

You will need to add the required data fields for the mail merge into the letter here, by clicking on the location within the document where you would like the data to appear and then clicking on the data required, for example "Address block" or "Greeting line".

The report will identify the amount of money that has been:

- Invested during the current tax year in the "TotalContribution" column
- The total remaining amount in the "TotalRemainingAllow" column

5 – Preview your letters

You should preview your letter to check its appearance. In particular, you may want to make sure that the address is in the right place for a clear-window envelope, and that any content in the main part of the letter is spaced correctly.

6 – Complete the merge

You can edit the letter and once finished you are ready to send your letter to print.

Please note that this mail merge process applies to Microsoft Office 2010. Later versions may include some variations to this process and you should follow the Step by Step Mail Merge Wizard for guidance.

For more information on our Reporting Services, including details of the other reports we offer, please see the Reporting Services User Guide, which you can download from our **Website** or call us on **0800 41 41 81**.

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