

Bootstrap Marketing

FOR INSURANCE AGENTS

presented by
AGENTLINK[®]



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Marketing for Your Insurance Agency

This marketing guide was created to empower insurance agencies trying to level up their strategic marketing. If you are a local, small to medium-sized agency, you have an excellent opportunity at hand to craft your brand and message in a way that speaks to individuals and impacts your community.

Yet as an agency of that size, you may feel you lack the resources to achieve those goals the way a large corporation with a hefty marketing department could do. This doesn't have to be your disadvantage. AgentLink exists as a Field Marketing Office, which means our primary goal is to partner with you, equipping you with resources for growth and sales opportunities.

That's the purpose of the e-book. Take it and make it your own. Complete the challenges we've included in each section. Then from there, it's our hope for you to better share who you are— your message— and become even more strategic in reaching your business goals.

Smart Marketing

Be aware of your who, what, when, where, and, why.

1. **WHO:** Know Your Target Persona
2. **WHAT:** Develop Your Message
3. **WHEN:** Plan Ahead and Roll Out On Time
4. **HOW:** Develop Your Brand and Voice
5. **WHY:** Remember Your Goals

1. Know Your Target Persona

What is a persona?

It's vital to find out as much as you can about your ideal prospects and customers. A persona goes beyond demographics of an audience and focuses more on your consumers' buying thoughts, needs, and buying process.

How do I find my target persona?

Create a profile or 2 describing who you think your target persona is. Even give him or her a nickname. Describe everything you can about them – the things that make them who they are– as if you knew them in person. You should also utilize really good survey questions. You can also take a sample of current clients and interview them.

2. Develop Your Message and Story

Elevator speech

Your message should grab your prospect's attention and relate to their "thoughts, needs, buying process."* Simply put, it's your story and HOW it relates to your prospect; who you are and how you are relevant to their life. For instance, how do you solve a problem they may have? How do you address particular needs? Why should they trust you in this area? This can go along with a business mission statement you may already have. Keep this at the forefront of all your content and special campaign planning.

Include your unique culture & language

Using language specific to not only your industry but the culture of your business is key in marketing yourself. Choose phrases, your own buzz words, descriptors, and ideas that will stick with people that you're ok being associated with you for a long time. This will guide your content and set it apart from all the noise out there on the web.

3. Plan ahead

Think ahead about any promotional efforts so you can do them strategically. When you market your content it should be timely, relevant, and consistently present.

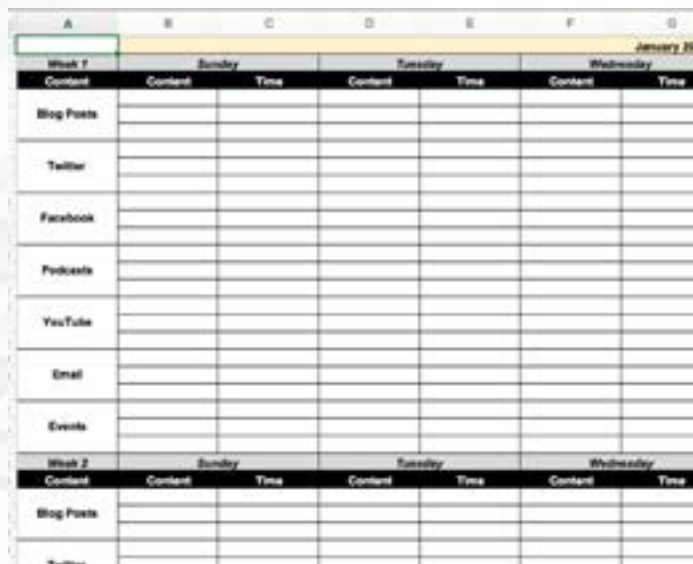
If your efforts are focused on a particular event, it should not be released too late or too early. Schedule all your content to be published on the best date possible.

Content Calendar

Host planning sessions as a team the same way you'd do strategic planning for your business for the upcoming year. Brainstorm creatively. Outline the year by seasons and events relevant to your industry. Then, you can use templates, spreadsheets, even a designated Google calendar just for notating content on certain the dates and times as far in advance as you want. That way you don't have to put time into planning and creating later on; you will just execute.

Why is it important to specify the time a piece of content is released online? If you remember the exact times, after a while you should see a trend for when your audience consumes information regularly. Then, you can plan around those key times with future content.

Here's a recommended resource that includes a spreadsheet, calendar, and more. Go to <https://coschedule.com/blog/2017-content-calendar-template/> Here's a glance at the way the spreadsheet is organized.



	Sunday		Tuesday		Wednesday	
Week 1	Content	Time	Content	Time	Content	Time
Blog Posts						
Twitter						
Facebook						
Podcasts						
YouTube						
Email						
Events						
Week 2	Content	Time	Content	Time	Content	Time
Blog Posts						
Twitter						

4. Develop Your Brand and Voice

What is it? Casual? Confident? Relatable? Humorous? Expert & informative? Are you B2B or B2C? What visual elements are used in your brand and how can you use that in future content? Also refer back to that unique culture and language used in your business.

5. Remember Your Goals

Is your goal to raise awareness? Or to sell a product? Are you aiming to connect people to your company and gain followers? Set quarterly goals, special campaign goals and, of course, constant reminders of your big picture goals to which all other goals should point!

Inbound/Digital Marketing

Inbound marketing is an ideology that focuses on getting a person in your target market to actively choose to read, click, and/or opt-in for more of what you're offering. This is accomplished with quality content conveyed as helpful or relevant to your target audience. This is where you must be aware of your persona.

It's still all about an end result of promoting your business and/or product. Here's how! After a person has made this active choice to connect with you, they begin a funnel process. Where they started out as a stranger, your effective content should move them through this transition:

The Stranger is:

- Now, a Visitor
- Who becomes a Lead
- Who becomes a Customer
- Then hopefully, a Promoter

These efforts are almost always digital. Outlets you probably use and consume on a regular basis – both personally and professionally – are some of the best tools to implement this marketing strategy. Today, if you don't prioritize your digital presence, you are missing the boat.

But there's still time to leave your unique footprint online and in your industry by becoming a promoter of good, helpful – even entertaining – information that will help consumers who need what your industry – and business – is offering. There is a way to share your helpful information in the right channels that will not just help people, but it will successfully promote and grow your business! Inbound marketing has multiple benefits!

In this section we will discuss all about the following:

- Blogs
- Social Media
- Direct Email Marketing
- Landing Pages & CTA's
- Video & Graphics
- SEO

I. Blogs

"No single thing in the last 15 years has been more important to me professionally than blogging... It's changed my thinking, it's changed my outlook... it's the best damn marketing tool and it's free." – Tom Peters, business management writer

The Meaning of a Blog

A blog is about being part of the conversation. It's one of the best ways to promote relationships with your business. Blogging is about open, honest talk and the trading of ideas. If done right, your blog posts should be found by people throughout the interwebs which can drive people back to your blog again, and drive them to your website, then ultimately to your brand and the products or services you provide. But, even if no one reads your blog, the discipline of writing about your business and your industry prepares you for sharing and conversing effectively with others in other ways; not with a "sales" tone but in a humble, authentic way. Here again is where your story and message come into play, and you must know it like the back of your hand!

Beginning a Blog

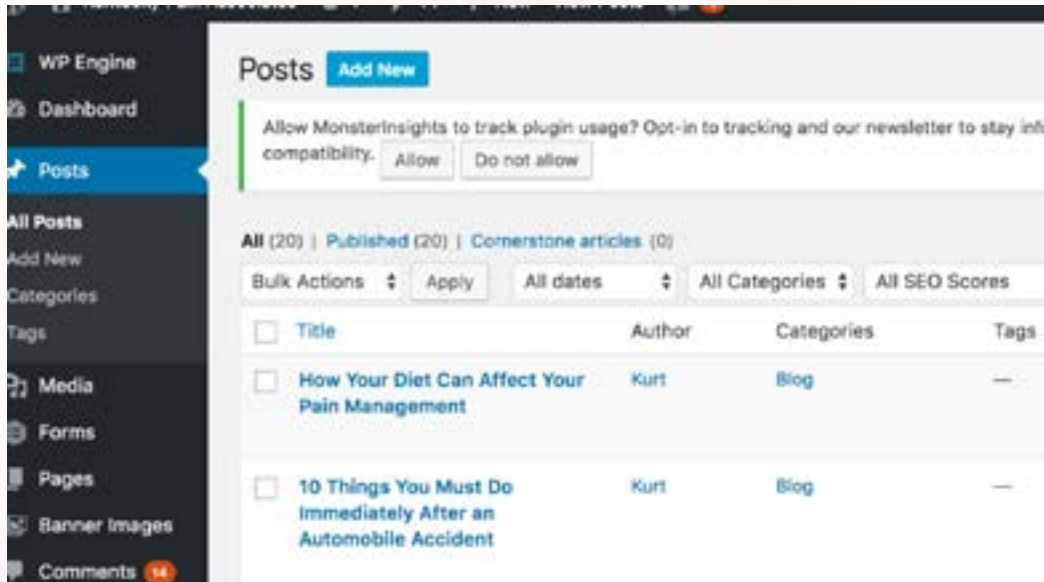
- Set up a blog through your current website platform where a blog template should already be available. You can also use other outside hosts. We recommend WordPress.
- It's important to consistently post content. Once you create your blog, it's best to just begin writing, taking into consideration what your business is all about before you choose blog topics.

Blog Posts that Stick

- Blog posts should be a minimum of 300 words in order to rank well with Google
- Using key words within a blog post and SEO apps such as Yoast also helps it to get picked up in online searches.
- Use good images in your blogs using effective alt-tags. A blog site will show you where to place alt-text.
- Using best practices will help your blogs to be more effective. Here's a blog post with some tips- <https://themarketingsquad.com/blog/blogging-basics-bread-butter/>

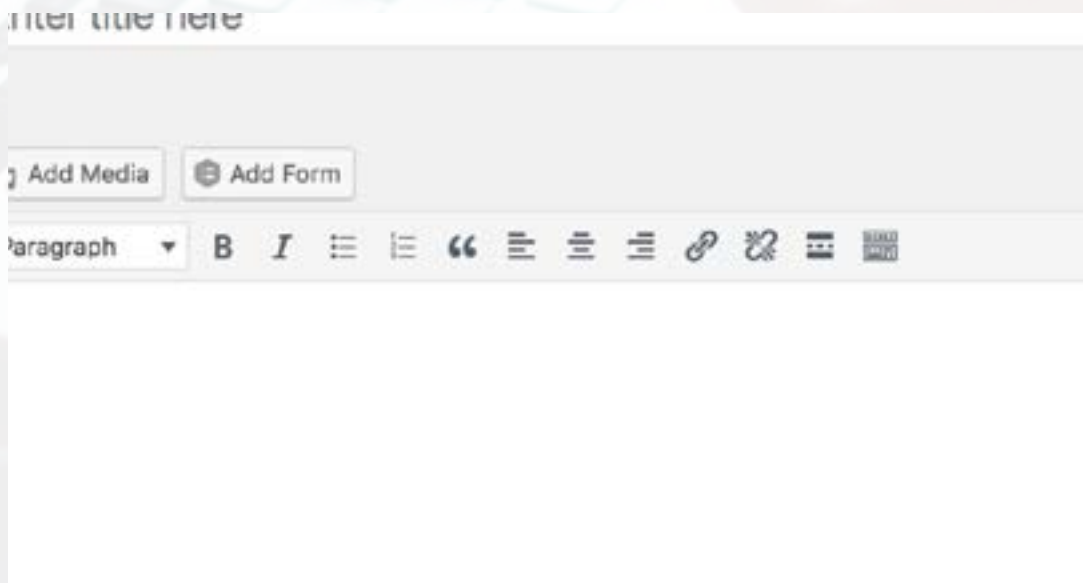
Walking Through a Blog Post

Here's an image showing you how to access the "Post" tab within WordPress. Then when you arrive on that page, click the "Add New" button to create a new blog post.



Next we've given examples of how to start and publish a blog post

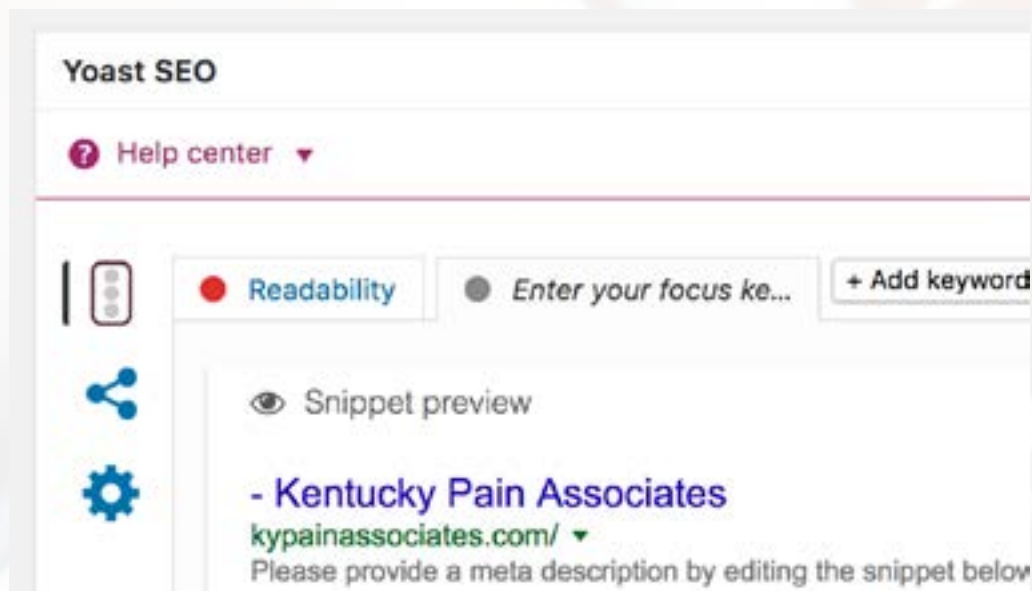
The image below shows the section for your blog title where it says "Enter Title Here." It also shows the body of the blog post where you write your content.



This next image shows what a plug-in called Yoast can do to maximize your content so it's picked up by Google. When you install it on your site, a Yoast section will show up at the bottom of every blog post guiding you to input keywords, post description, and other advice to improve the way your blog is ranked on Google.

At the bottom right of every post there's a featured image section allowing you to upload an image. Every post should have a featured image to increase the engagement with this post.

Hit the update button in the upper right corner of your page to officially publish. You can also hit the preview button or make changes even after it's published.



Application to the Insurance industry:

Create a blog that informs. Many people feel very overwhelmed or uninformed about insurance options and the inner-workings of a policy and not to mention the politics involved. Your blog posts can be a casual way to answer questions. Also share local things in your area and inside looks at your very own workplace. That will, for sure, set you apart from other insurance blogs.

Personal Challenge:

Write 3 blog posts in the next month. Choose topics that would attract your target audience. Work to align all 3 blogs with the cohesive voice and brand you desire.

II. Social Media

The Power of Social Media

"The power of social media is it forces necessary change." -Erik Qualman

Social media breeds virality. It also compels engagement more than any other outlet through its liking, sharing, commenting, and reposting features.

Beginning in Social Media

Set up accounts with the social channels you believe are most popular with your target audience. For instance, SnapChat is known to have a younger audience. That doesn't mean only teenagers use it. Brands who want to reach young people or want to have a more youthful and energetic brand are using it successfully, like Gatorade.

LinkedIn is a more professional channel as it has a focus on career development. Paid ads have been lucrative for many businesses on Facebook. Each channel has its unique identity and strengths. Social media usually allows for a more casual presence, even a need for entertaining content. Hone in on your brand and have fun with content here. But you can take your business far with a great social media presence and social media ads.

Overview of Popular Social Media Channels

- **Facebook:**
The largest social media platform. With close to 2 billion users, Facebook is a powerful way to connect people to your business. Facebook is also well equipped for advertising (see Facebook Ads).
- **Twitter:**
A quick and efficient way to convey a message and connect with others. Twitter is one of the most likely avenues for a post to go "viral" with the sharing (retweeting) of a tweet. It's best used with hashtags to group content and draw attention to your posts.
- **Instagram:**
A great platform for visually appealing content and large-scale recognition. Great for events (think picture sharing) and gaining attention through giveaways or raffles. Like twitter, marketing on Instagram is most successful with the use of hashtags.
- **LinkedIn:**
The avenue for professional connections. This a professional networking tool that can connect you with potential customers, employees, partners, like-minded businesses, and more.
- **Pinterest:**
This should only be used if you have quality images to share and/or you want to link them to good written content they can use when they click on your pinterest image. This is especially helpful for promoting products or blog posts.

How to Grow Your Social Media

- **Plan and post regular content.**

It's helpful to create a calendar in advance with a month of content. Don't forget about special dates in your industry or national holidays so you can create content focused on that and post it on the correct date. The channels have optimization so your post may be viewed by triple your average if you posted something everyone was talking about that day, used the right hashtag, etc. You can even use programs to schedule content in advance. Check out Buffer or HeyOrca.

- **Curate other people's content.**

This means sharing what other people in your industry produce. Obviously there are certain things you wouldn't want to share from your direct competitor, but you should share a blog post from other companies. Or find ones outside of your industry that have universal application like articles about time management and other personal development tips. Sharing content from others not only helps you to post more frequently (since you're not just relying on your original thought) but it's encouraged because curating promotes the goal of community and the bigger conversation we mentioned earlier.

- **Follow, Like, Comment, Respond.**

So that your efforts are truly a part of the community and conversation you are helping build, you must engage beyond churning out posts. Follow other accounts and like their content. Respond to comments in a timely manner and write your own comments, too! Some companies carry a large part of their customer service on their quick responses on social media.

- **Start events and groups.**

Having an event page to go along with an actual event you're hosting can increase engagement. Same goes for your networking efforts.

- **Join groups.**

Search for existing social media groups that you can join in on. There are very successful ones focused on sales and local businesses of specific communities.

- **Paid Ads.**

This is self-explanatory. Paying for the ad space on social media increases its reach compared to a normal (unpaid) post. Still, paid social advertising is not a stand-alone marketing strategy, and it should be used in addition to your overall strategic marketing plan. By creating quality (unpaid) content on a regular basis and using paid ads to boost some of it, you will take your marketing to the next level.

How to Set Up Social Media Ads

Facebook

To set up a Facebook ad, you'll need to be made an ads manager for your company's Facebook Business Manager account. Once you're in there:

1. **Choose your objective** - For the purpose of creating a sponsored post, click "Send people to your website" and give your campaign a name.
2. **Choose your audience** - Options for setting your target audience include location, age, gender, interests, and even what they buy on and offline.
3. **Choose the placement** - You can select "Automatic" and Facebook will display your ad where it is most likely to reach your audience, but if you don't want to advertise on Instagram (more to come on that later), then you can manually choose your placements and deselect Instagram.
4. **Set your budget** - You can either set a "Daily" budget, which allows your campaign to be continuous or for a set number of days, or you can set a "Lifetime" budget, which determines how much your ad spend will be over a specific period of time. When setting your schedule, the advanced "Ad Scheduling" option even allows you to set specific hours and days of the week.
5. **Choose your format** - There are two format options: single image and carousel. The carousel option lets you use 3-5 images or videos for displaying multiple products, more brand info, different product features, or step-by-step processes.
6. **Upload your media** - Images should be 1200 x 628 pixels and text should cover no more than 20% of your image.
7. **Enter your ad text – This includes:**
 - Connecting your Facebook page
 - Entering the website URL
 - Creating a headline
 - Creating the post text
8. **Preview your ad and place your order.** - Then you have a live ad!

LinkedIn

To set up a LinkedIn ad, go to campaign manager. Once you're in there:

1. Choose company account
2. Select "Sponsored Content" – This ad will reach LinkedIn members right in their feed.
3. Enter your campaign name
4. Choose the update to sponsor – You can either choose content that has already been shared on your page or you can "create new Sponsored Content." If you choose content that has already been shared, skip steps 5 and 6.
5. Create the post text – Include a link to your website content in your post.
6. Upload an image – Images should be 1200 x 627 pixels, while maintaining a title safe space of 1000 x 586 (this just means it will be cropped to that size for desktop).
7. Choose your audience – Options for setting your target audience include location, company, industry, job title, gender, age, and group membership.
8. Set your budget – First, you'll have to decide between CPC and CPM. With CPM, your ad will get shown more often, but you pay a set rate. If you choose CPC, LinkedIn will automatically set your bid rate to reach the majority of your audience, or you can set it yourself. Next, you will set your "Daily" budget, and, finally, your ad schedule.
9. Enter your payment information
10. Review your order and launch your ad

Application to the Insurance Industry:

Use your social media channels to be approachable. You can still maintain a professional presence, especially with certain channels, but social media is an outlet to start a conversation with peers and customers alike. Use relevant topics and even humor to do so. Since insurance is about people and families at its core, use social media to relate to the very people to whom you provide your products and services.

Personal Challenge:

If you don't have any social media accounts for your business, create 1 that you think will best reach your audience. After you set it up or if you already have one or more social media accounts, create a content calendar of content for every weekday for the next month. Also spend 1 day of each week liking and commenting on the pages of your peers and customers as well as sharing some of their content as part of your calendar. Sharing is caring!

III. Direct Email Marketing

Email marketing goes beyond sending a message from your personal address to one person and CC'ing 53 other people. Companies have built their mailing list to the multi-thousands and their open rates are much better than from personal addresses. Plus, sending a massive amount of emails from your personal account looks unprofessional, too.

This is a creative and effective way to communicate with your current or potential customers. You can talk about latest news updates, give insights into your culture or business, provide tips, or even general information. You can promote yourself while still being a great resource for others. Don't be too sales-y. This is more of a resource to assist, but you can promote when appropriate.

The only time you might get away with a more straight forward sales pitch is when you want to promote a clear incentive to the reader.

Choose your email platform

There are a variety of email platforms, from free and minimal paid to more robust and expensive platforms. Many platforms can also be CRM tool, as well.

Here are three that are different levels of expense that are commonly used.

- **MailChimp** - MailChimp is free as long as you've got 2,000 or fewer subscribers across all lists in your account. You can send up to 12,000 emails per month without paying a dime or entering a credit card. However, once you cross that threshold or want more features, you will have to start paying a little more. Go to MailChimp.com to check out their pricing plans.
- **ConstantContact** - This platform is similar to MailChimp in charging per amount of contacts. ConstantContact has a little more customizable features and multiple campaign options, if you're doing more email sends. Go to ConstantContact.com to learn more about these pricing options.
- **SharpSpring** - This is a more robust platform with more than just emailing. It also does marketing automation. This includes emails, workflows if a person takes action on the site, IP tracking, and much more. Just like the previous two, SharpSpring charges based on the amount of contacts. Go to SharpSpring.com to learn more.

Create a mailing list in your email platform.

Grow it through:

- Using your blog and social media, enticing people to sign up for your emails.
- In-person events. Many will fill out their information once they've talked with you OR if you give something away as a response to receiving their info.
- **DO NOT** grab people's emails off anywhere and just add them to your email list. This is a bad practice and you will get dinged for this or just have a lot of ticked off people unsubscribing at once. If that happens, it can give you a bad status with your email platform.

Good Elements of an Email Campaign or E-blast

- Use good Subject Lines
 - Grab attention or sound conversational with a straightforward statement. Don't make it too long.
 - Think about what catches your attention. The more spammy headlines get caught in the trash. Avoid words like free, bargain, or pre-approved. These instantly send you to the spam box.
 - Have fun with the subject line. A meaningful emoji can even increase open-rate.
- Nobody likes to get an email saying, "Dear Sir or Madam." It's impersonal and shows lack of research. Personalize the email (which can be done easily through the above platforms), start with a hi or hello, or don't start with one at all.
- No spamming! Consider strategic timing by what is relevant and worth their time. Don't abuse the inbox by sending too much and too often.
- Try A/B testing. This is sending two slightly different emails to see which works better. Think the same topic but trying different subject lines, time of day for sending, or tone to see which get more open rates can give you insights into what is more effective with your readers.
 - Assess your responses to emails after a few months to find out what best reaches your audience. Testing and tweaking based on the results is the best way to improve.
 - People don't open the 9am emails? Try a different time and/or day. Readers aren't clicking on emails with emojis? Don't use them. Customers like it if you are adding more information to the emails, such as some links to resources or your latest blogs? Include more information for them.
- Use a CTA and exterior links in EVERY email. (We cover CTA's on another page.)
 - You got them to open the email, now get them to do something. Once readers check your email message, they're more likely to click through to your social or web pages if they are linked.
- Segregate your email lists based off who they are as a persona to you. Such as, if it's a family versus a business. What about a different specialization? These will require different language and even define which products or services you will promote to each list.
- The difference between an Email Blast compared to an update or newsletter is it should have a clear and present action the reader should take. It's also best for what you're promoting in an e-blast to be catered to a specific list. An update or newsletter can just convey news. It's perfectly fine! And it can be sent to a general mailing list.

Application to the Insurance industry:

Monthly email newsletters work well in the industry. Also, because there are frequent updates in policy and products, utilize email as a way to keep your subscribers informed. This means conveying trust in the information you share.

Personal Challenge:

Create several opportunities on your website for people to sign up for your email updates. If you like in-person networking opportunities, you can also think of creative and easy ways for someone to be added to your mailing list when you interact with them.

IV. Landing Pages, Call to Action's, and Content Offers

You want people to give you their information! When you get that you strike gold. It's a big part of lead generation with your website and moving your audience through the funnel process. However, you don't want everything to just go to your contact page. People want to be able to come through the funnel and reach you at different points, wanting different things. So, you have to accommodate those needs while still getting what you want from them, too.

First, think about what you want from a strategy or a goal. Do you want to build up your email list? Do you want to get a conversation started? Well, with any of that you want things like their name, email, phone number, and what they are interested in. There's a balance. You ask only what is needed.

Usually this kind of interaction has to take place before you can jump to the greater action you want from them such as "buy this product" or "hire us for our services." But if that's the action you want from them, the copy you include on that page and the action you want from them should be clearly evident with things like a "Buy" button, etc.

So, whatever you are trying to promote with a certain strategy, the process includes various parts. You start with a mini ad (we call the Call to Action - CTA) that people will see on your site, on your social channels, and/or for online ads. This CTA gives a hook for people about what you're offering. You want to have multiple places that they can find and click on this CTA. The hook will usually ask them something or relate to them but always include an action word. Phrases like "See what we're talking about here," "Click here to download," or "Get our limited offer!"

That then them to a page that has some information about what you are offering as well as a form to fill out. We call it a Landing Page. This can be sales-y, but still reasonably short and helpful to them. Think a short paragraph or two. But it should stay aligned with the messaging that first hooked them. This page will describe what they will be getting when they give their information to you through signing up.

Finally, once they provided their info, they will get the promised offer. Sometimes it's a shiny resource they want like a downloadable guide, article, infographic, etc. We call them Content Offers. They are full of valuable content they can use and re-use again. Sometimes what they receive after they fill out the form is the follow up call to start the conversation both parties desire to have.

Here are the definitions again:

CTA

Think of a small graphical ad on your site or other channels you have. Here are some of its characteristics.

- CTA stands for Call to Action.
- It presents a hook, which gets people to act. The goal is usually to click and get information.
- CTA's should be placed on your homepage, other parts of your site, in your so
- You don't want too many different CTAs at one time leading people to many different promotions. Strategically plan what you want to focus on for a specified time.

Landing Page

Long form content. Here are some of its characteristics.

- A person should "land" on this page by clicking on your CTA. Hence, the name!
- On that page they are given more insight into yourself or what you're offering. This can be the newsletter, an e-book, or a free one hour consultation.
- Persuade them to sign up, download, or so on. Especially since they've already come to this page they are probably very interested in what you're offering and/or signing up. Just give him the last push they need by describing why they will benefit from signing up.
- Always know the WHY behind them coming to your page and why they should want to give your their info. It could be a training they can join in on or a special offer they can download.

Content Offer

The content offer is simply reuseable content you are offering them, with a clear benefit to them, in exchange for information. You want to make sure that it's valuable for your target persona or audience.

- Please don't make people give you information in order to get something that should be free, such as info about who you are. Here are examples of valuable offers:
 - A sheet comparing the different coverage of different products or services.
 - An e-book about customer service tips for independent agents
 - A white paper or webinar that trains on new products.

You will most likely need to work with whoever manages your website to create these marketing pieces. This typically requires changing out every year or two at a minimum, which requires a bit of website knowledge. Also, you can look at our list of resources later in this book to see some helpful websites to assist with creating these content offers and everything that comes with it.

Application to the Insurance industry:

The industry insurance is fairly campaign- driven. There are different times of year for different emphasis such as open enrollment and certification season. CTA's and LP's are very useful for special promotions and campaigns.

Personal Challenge:

Create a special campaign that invites your audience to opt-in to receive valuable information about a product or to attend an event with your agency. Create the short language for drawing them in –a CTA. Then write out more in-depth information about this campaign –a Landing Page. Use both sets of material and work with whoever manages your website to publish it. Hint: Connect this CTA and LP with your social media, in an email blast, etc.

V. Search Engine Optimization

The Purpose of SEO

- Be seen and heard! - Getting exposure on Google (or the other search engines) isn't by chance. It's with intentional wording and positioning of your content.
- Geo-target - Working on reaching a certain demographic or region? Use the ability to target website users accordingly by reaching specific areas.
- Keywords - It is important to determine the words that potential customers will use to search for products that you are offering. Optimize your pages by using these keywords as much as you naturally can within your content.
- Building Backlinks - Building up a stream of links from trusted sources is very important. Does a trusted vendor have a website? Ask if you can have a mention and a link on their website, and in return, you can do the same.

3 Easy Things to do to maximize SEO on blog posts or a webpage

1. Check your keywords

As mentioned above, keywords are key. Making sure that the keyword focus of your blog post or webpage is prominent. That's the first step toward ranking in a search for that topic. It is important to have the keyword used liberally throughout the article or page, while maintaining a natural feel.

2. Take Advantage of Meta Descriptions

Each of your posts should utilize a meta description. This is the snippet of the post that appears on a search engine page. Writing an accurate, keyword-rich description is very important.

3. ALT Tags

Another important piece to your blog or webpage SEO is insuring that you have the correct descriptions along with your images. When uploading a photo, be sure to add in a description that relates to the article and the photo. This will help index your photo in image searches, and direct readers to your article via the photo. More on graphics in the next section

Application to the Insurance industry:

Get your next blog post noticed above your competitor by using SEO. You can stand out as the go-to for info and support by making your content obtainable.

Personal Challenge:

When you write your blog post, don't forget to add the alt tags and keywords using Yoast!

VI. Video & Graphics

Many social media posts on many channels rank best with the use of graphics or video. Right now, Facebook Live –a live video you take within Facebook– is one of the best ways to get the attention of viewers. And Facebook gives that video prevalence on news feeds over regular post even after the video isn't live.

On your website or blog, good graphics are very important. It's better to have one or 2 great ones than to clutter a webpage with a bunch of photos, especially if they are sub par.

Any special marketing campaign should have a customized graphic that helps connect each piece of that campaign. It's the same concept as a logo for a business. With that campaign, your Landing Page should use that graphic as it's header, preferably formatted as a banner toward the top of the page and full width of the page. Your Call to Actions should utilize the same photo or similar.

ANYWHERE you place an image on a site – on your homepage, within a blog, etc.– you have to give that image good alt tags. The SEO section of this guide already mentioned alt-tags. But here's a picture of where you should be asked to give alt-tags when you upload an image. In this example, the alt text was written exactly like a person would search for it in Google. It reads, "Are Stickers or Personal Items Allowed on Company Property?"

How do you think those Google images show up when you do a Search? It's because of the alt-tags attached to them. Those top images you see have probably chosen their alt-tags very effectively. That's why they show up as a top choice on Google.



Title	Are Stickers or Personal Items Allow
Caption	
Alt Text	Are Stickers or Personal Items Allow
Description	
Uploaded By	Allison Taylor
Uploaded To	Are Stickers or Personal Items Allowed on Company Property?

Required fields are marked *

These are the ways we recommend a business should use video.

FB Live Give an exciting sneak peak at an event you're hosting. This will not only catch people's attention who will engage on your page and even follow your page if they weren't already. But this can also be useful in enticing people to come to the next event like the one you're previewing. Use FB Live for casual things, too. Show a few minutes of a fun moment inside your office. FB Live is meant to convey the raw and real exposure of what's going on in your life.

Youtube Use your phone to record something then upload straight to YouTube. Today, it's more effective to have a some creative direction ahead of time for this video. It could be a hilarious skit or story you convey in the video. Or you could make a video that is instructive. After that, the video content can be re-used and viewed over again for as long as it's available on Youtube. You can determine if this channel is commonly used by your intended audience.

Testimonial Videos Whether it's shared on youtube, social media, or it's a MP4 file uploaded directly on your site, a real testimony of how your business has impacted someone—it can have the most direct impact on a viewer because it's relatable. Sharing testimonials in text form is great, too. We recommend every business website have a section for that. But how gripping is it when a live face is speaking directly to you about what they've experienced as their eyes and other body language connects to the words they're speaking.

Webinars

This is an online discussion or teaching seminar. Here's a website that works great for hosting these kinds of virtual events. Most of the time they are directed by live video or through a slideshow with live audio. Check out <https://www.gotomeeting.com/>

You can and should use these videos and/or graphics in all the digital strategies we've already covered.

Application to the Insurance industry:

Webinars are effective tools in the insurance industry. Testimonial videos are also great because they combine results with a personable, relatable face.

Personal Challenge:

Host a FB live during your next event, whether it's a industry conference or just a casual internal team event. Also designate one colleague to take pictures (a good camera phone will work) of this event and use the photo(s) in a post on all your social channels after the event, too. We also challenge you to create a webinar around a great product. Use the webinar to explain the product and train others in how to get connected to the product and how to sell it effectively. Don't forget to promote the webinar in various ways long before you host it!

Traditional Advertising & Marketing

These efforts are usually in-person and/or include physical material. More people work remotely, shop online, and communicate regularly through social and email. That's why we emphasize your digital marketing efforts so heavily. There is still a place for face to face engagement and a quality hand shake.

I. In-Person Events

In spite of the digital age, there's still great power in a Face-to-Face. Personal conversation and connection can build trust and rapport. Simply put, in-person interaction can make all the difference in marketing yourself. Always connect in-person efforts to your online presence—before and after. It will extend the reach of those events. Promote them through newsletters, emails, blogs, social and more.

Conferences, Industry Shows, and Exhibitions

- Conferences and Industry shows are a great avenue to connect with like minded individuals and businesses. Though networking may not be the first objective of the event, networking can happen naturally at these events.
- Always bring business cards or some kind of "swag" to pass out. You don't have to invest in personalized items as long as you build up hype around whatever item you hand out.
- Always be intentional about promoting your business while still being relational. One of the greatest ways to promote your business is through the follow up. So find ways to capture people's information when they come in contact with you, even if it's through giving out your swag.
- Many conferences allow exhibitors but many times you have to pay. If a particular conference would be good for marketing your business, check with the conference committee to inquire about exhibiting. If it's a large exhibition, you have find a way to stand out from the rest.

Networking Events

- Networking events are a great way to provide face-to-face in the most relational way.
- If you you want to be known for valuing your networks, you must be willing to attend others' events. To do that, search local networking events in your city or talk to peers for recommendations. LinkedIn also provides information regarding upcoming networking events in your area.
- You can also plan to host your own networking event. Here are some things to do when hosting:
 - Pick a comfortable and inviting meeting place. A large room at a restaurant, or more private meeting location can be beneficial.
 - Provide a means for attendees to have food and beverages. At a restaurant they can purchase their own, but at a meeting room you may need to provide catering and charge an admission fee for the event to compensate for food and set-up costs.
 - Consider allowing for booth set-up from your peers
 - Set an internal goal for the event you host. One such as, the number of people in attendance or how many new connections made.
 - Set an external goal for the event, such as learning more about a valuable business topic or a fun open house.

Swag

If you are going to invest in physical items to give away that are not something you'd be excited to get on Christmas while also not financial straining, consider these questions:

- Will they use this item?
- Could it be used more than one time?
- Will it create a buzz?
- Is the quality good enough to be associated with us and our brand?
- What's the potential reach if I use this item at [insert event]?

If you can't answer most of these questions positively then it might not be a worthwhile item. Your reach has to do with who would receive the swag item—a desired audience?—and the number of those people you'll come in contact with. Your goal for these items and the events where you share them should be:

- Brand awareness
- New connections and captured info
- Potential leads

And don't forget with a personalized swag item, your logo and story should always be evident.

Sponsoring Local Events

- Another great way to market your business is to sponsor local events. This gives you visual presence and conveys your values. These could be events such as:
 - Cultural gatherings
 - Music and heritage events
 - Non-profit or charity event
 - Sporting events

Application to the Insurance industry:

Whether it's hosting a health fair or training or attending a conference, there are plenty of relevant events for your industry.

Personal Challenge:

Attend a meeting with a desired carrier or an FMO like us!

II. Promotional Print Marketing

Flyers, Brochures, and Cards... oh my! And we've already mentioned swag! Distribute these items and see where they go!

Here are tips for the best way to format these materials:

- You may create your own. But most likely you will outsource these materials, like a business card, to a print shop. We recommend you ask a designer about these types of print materials.
- If you are designing the look and copy yourself, make the main points clear.
 - Your business name, WHAT you do, and contact information should be central!
 - Don't make it too wordy.
 - Use white space around the text so it's not overwhelming for the eyes to look at the main info you're conveying – what you do and how to get in touch.

Here are some of the best ways to utilize these materials:

- These materials can be distributed in person when you are at networking events.
- They can be placed at key businesses you would likely partner with.
- They can be used within our office and passed from a client to a prospect (that's the last step of the funnel process– when a customer becomes a promoter!)

These methods are not the most strategic because you are not able to be exact in your audience the way you can with email marketing and SEO-driven content. But it's still very common today for your business card to be passed to just the right person to make the lucrative connection you want.

Direct mail sends

You can also consider sending direct mail. Still, this is only safe when a lead gave you that information by choice rather than collecting personal information another way. Even then, you may annoy someone with a print piece we've consider "junk mail" at some point in our lives if we're being honest, since it's not from an individual we know. And you cannot unsubscribe from direct mail list as quickly and easily as you can an email list. You may improve your responses if your direct mail includes an incentive that's time-sensitive to give you a great purpose for sending that value to the recipient.

Application to the Insurance industry:

What print item would help you stay top of mind with your intended audience and help you stick with a potential lead at your next event?

Personal Challenge:

If you're selling Medicare, direct mail with a friendly greeting and informative, easy to read info may be the best way to reach your 65 and older prospects. Also, if you're a new business or it's been a while since you've packed up your story into a brochure, this might be great to share your story to many at a future event.

Community Presence

Instead of ONLY focusing on generating the next transaction, creating community and conversations around your business and industry promotes higher levels of engagement and customer loyalty.

Speak into your local region with a lot of your content. You can geo-target your content to catch the attention of specific areas, especially with digital content such as webpages and social media posts. That's where SEO comes in which we mentioned earlier.

Be aware of current events, holidays, and topics that are important to your area. If it's appropriate for you to speak into those things in some way, doing so will help you get noticed. This applies to social media, blogging, and any other content you might produce. You will be more noticeable online through search options within social media channels and in search engines.

As a business, you should be present at key local events. Whether you choose to sponsor some of them or just participate, it's important to be active in your community. This not only promotes your business through brand visibility, but it also shows the community and individual consumers that you care.

Being active at local events can help associate your business with something positive – that's why picking the right event is important. It also puts faces with a name. Now they've not just heard about you, they've seen you in action in something they were a part of, something important to them.

Cross-Channel

A lot of your information should be used in multiple channels at the same time. That's what makes it a strategy and not just a random occurrence.

For example, if you are going to an industry-wide event, blog about it a week before you go. Then blog about it afterward. Announce on social media that you're attending ahead of time. During the event, post updates about the event. Almost all social media channels allow tagging and check-ins which highlights the radius you're in instantly.

This doesn't necessarily mean you clone the same text and place it in all your channels. There are certain styles for each channel. Also if you copy things from a webpage to a blog, Google may even think it's not original and it will be flagged for it.

So if you're promoting a particular topic, you can tweak the language and graphics for each channel. This will ensure it's received well by that audience. If you aren't aware then you might share something that is not formatted for that channel preventing it from being viewed at all.

Be Intentional

Be intentional with what you share, where you share it, and when. But don't be afraid TO SHARE. You have a story to tell and a purpose to what you do. You have knowledge many people don't possess and services they need. You have goals to reach, and you have to generate connections and leads to meet those goals and grow as an agency!

Resources:

Canva

Free graphics as well as digital and print material templates.

Mailchimp

Free email platform up to email addresses.

SurveyMonkey

For surveying customers.

HeyOrca

For creating and scheduling social media.

Buffer

For creating and scheduling social media. A free version is available.

Hubspot

Free inbound marketing training.

WordPress

Website and blog platform. Free versions are available.

Yoast

Free app to help with search engine optimization within your blog.

Google Analytics

See quantitative results for the number of website visitors and the effectiveness of your keywords, web pages, and more.

Feedly

Follow trending articles and receive alerts on updates related to your industry and relevant topics. Helpful for sharing content in a timely manner and spurring ideas for original content.

Go To Meeting

Host video conferences or webinars.

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