

AGENT MARKETING PLAN

Tips for Developing Your Own Marketing Plan

Whether you are an independent producer, an agency, or an agent looking to grow, it all starts with a plan!

Writing a Marketing Plan doesn't have to be a difficult task, nor does it need to follow any formal style. In fact, Pinnacle suggests creating a simple outline. The important part of this process is that you need to write it down! Your plan will become your navigation system, from which you can always revise and review as needed. If you already have a plan, revisit it as your business objectives may have changed since its creation.

Your Marketing Plan should answer the following questions.

- Who is your client?
- What are your clients looking for?
- What differentiates you from your competition?
- What marketing techniques have you used that have worked?
- What are your short-term and long-term goals?

YOUR PLAN – LET'S GET STARTED!

- **What are your short- and long-term business objectives?**
 - Many suggest using the SMART method: making sure your goals are Specific, Measureable, Attainable, Relevant, and Timely (see provided sample).
- **Who is your client?**
 - For this, you'll need to figure out what demographics they represent, (age, income, marital status, etc.)
- **Where and-or what are your markets?**
- **What makes you unique?**
- **Do you have a brand?**

Choosing tactics is the final step, and where most agents start when it comes to thinking about marketing. Your objectives should dictate what activities you engage in when looking for new customers or markets.

Strategic Options:

- Networking
- Strategic Alliances
- Referrals
- Mailings or Other Lead Appointments
- Trade Shows
- Seminars (Educational & Sales)
- Media

However, without a plan, it is difficult to know who your target market is, and what you should be discussing with them. You'll always want to be on the path to success, and to do that, you'll need to be able to measure your accomplishments.

WHAT STRATEGY FITS YOUR SKILLSET?

Time to think outside of the box and try new strategies. As your partner, Pinnacle Financial Services would like to help you in growing your business. Our process starts with a review of what you do now, and helps build a plan around it. Contact your sales director for a one-on-one consultation: 1-(800)-772-6881.

GOAL SETTING PROCESS

Not sure of what works?

- 1. SET A GOAL**
Medicare Advantage, increase sales by 10% for AEP
- 2. ESTABLISH A TARGET**
Existing and new customers who are 65 and older, and live or work within a 5-mile radius
- 3. DECIDE ON STRATEGIES**
Print fliers, send postcards, and schedule meetings
- 4. BUILD YOUR TACTICS/MESSAGES**
Channels- reach existing customers via email, blog, and social media. Reach potential customers via website and social media, also promoting via websites, list servers, and publications. Print postcards/fliers. Message- "Simplify the Medicare Maze"
- 5. MAKE A CALENDAR**
Post reminders on Facebook and Twitter before and during the target time period. Create a weekly promotion schedule. Distribute postcards or fliers at least once a month
- 6. WHAT IS YOUR MEASUREMENT OF SUCCESS?**
Total sales in a time period. Additional expenses (if any). Total number of customers. Average sales per customer. Test which times/days during the week get the most engagement leading to sales.