

## Tips for Developing a Marketing Plan

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

Writing a Marketing Plan doesn't have to be a difficult task. It doesn't need to follow any formal style. In fact, we suggest a simple outline. The important part is that you need to write it down! It then becomes your navigation system, and you can always revise and review as needed. If you already have a plan, revisit it as your business objectives may have changed!

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 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 (make your goals Specific, Measurable, Attainable, Relevant, Timely) (See attached sample)
- Who is your client? For that you'll need what demographics (age, income, marital status).
- Where/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 when looking for new customers or markets.

Strategic Options:

- Networking
- Strategic alliances
- Referrals
- Mailings or other lead appointments
- Trade shows
- Seminars (Educational and Sales)
- Media

But, without a plan, it is difficult to know who your target market is, and what you should be talking about. You always want to be on the path to success, and to do that you have to be able to measure your success!

What strategy fits your skillset?

Time to think outside of the box, and try new strategies. As your partner, we would like to help you grow your business! We'll start with a review of what you do now, and help build a plan. Call your sales director for a one-on-one consultation.

**800-772-6881**

Not sure what works?

## **Goal Setting Process**

### **1. Set Goal:**

Medicare Advantage Increase sales by 10% for 2018 AEP

### **2. Establish Target:**

Existing and new customers who are 65+, and live or work in 5-mile radius

### **3. Decide on Strategies:**

Print fliers, postcards, and schedule a meeting

### **4. Build Your Tactics/Messages:**

Channels: reach existing customers via email, blog, and social media. Reach potential customers via website and social media, also promote via websites, listservs, publications. Print postcards/flyers. Message: Simplify the Medicare maze.

### **5. Make a Calendar:**

Post reminders on Facebook and Twitter before and during the target time period.

Create weekly promotion schedule.

Distribute postcards or flyers at least once a month.

### **6. What is Your Measurement of Success?:**

Total sales in time period

Additional expenses (if any)

Total # of customers

Average sales per customer

Test which times of days/days of week get most engagement leading to sales