



# MARKETING TIPS

FROM TOP PRODUCERS



NO. 1

2017



“  
WE SURVEYED  
INDEPENDENT  
INSURANCE AGENCY  
OWNERS ACROSS THE  
COUNTRY TO FIND OUT  
WHICH MARKETING  
STRATEGIES ARE  
WORKING FOR THEIR  
BUSINESS TODAY. THESE  
ARE REAL AGENTS  
GETTING REAL RESULTS  
RIGHT NOW.

INSURANCE PRO AGENCIES

”



# FACEBOOK

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One thing I have done, is when a company rep comes I ask for a nice gift for my customers, I have received chairs, blankets, and such and I post on FB to like and share and I keep track of who shares and do a drawing, I have drawn customers names that are not my customers, but when they pick up the gift, they become customers.

**MIKA J. – WHITESBORO, TX**

Facebook has worked very well for me for commercial business. I privately email clients on messenger advising them on our services.


**GLADYS D. – OAKBROOK, IL**

I use Facebooks ad boost. Pick a post from your Agencies FB page and click boost. You get to choose the target age, demographics and how much a day you want to spend for how many days to run the post. It's a cheap way to reach so many local households.

**DAWN K. – GREAT BEND, PA**




# AGENCY MANAGEMENT SYSTEM

A wide-angle photograph of the Chicago skyline at sunset. The sky is a deep blue with a hint of orange near the horizon. The city's skyscrapers are silhouetted against the sky, with some reflecting the warm light. In the foreground, a body of water (likely Lake Michigan) reflects the city lights and the sky. A bridge is visible in the middle ground, crossing the water. The text "AGENCY MANAGEMENT SYSTEM" is overlaid in large, white, serif capital letters on the left side of the image. A small white diamond shape is positioned below the text.

**A** Anyone that you don't write now becomes an ex-date.

Use your agency management system to remind you to requote in six months or next year. This also goes for any clients you lose to other carriers. Persistence is the key. You may not write them until three years from now, but you will get them! **DAN W. -LAKE VILLA, IL.**





“  
WE’RE ALL  
LEARNING  
HERE; THE BEST  
LISTENERS  
WILL END UP  
THE SMARTEST.

JOSH BERNOFF

”





# DIRECT MAIL

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“  
TODAY IT'S  
IMPORTANT TO  
BE PRESENT,  
BE RELEVANT  
AND ADD VALUE.

NICK BESBEAS

”

## **BILL W. – ORANGE PARK, FL**

I send colorful glossy postcards to a list of people I get from the property appraiser website. I look for the homes and clientele I want to write. Then I make up labels to print and I send a glossy postcard that has my picture and products offered. I find it is the easiest way to make sure that they see it. If it is in an envelope, they might never open it up. It is my goal to send 90 a day (3 sheets) x's 5 days. The cost is .34 a postcard. I get about a 1% return. I am now going to send repetitively to a select list of households which I wasn't doing in hopes to raise the response rate. Stats say if you send the same piece three or more times, you have a much better response rate. The longest time is setting up the labels in excel as to make them look professional (clean up the info from the property appraiser list). put them in excel sheets of 90 and date when I sent them out. That way I print one excel sheet which gives me 90 names and can easily keep track of when I sent them. I create my own labels with excel and word doc. That part's pretty easy to do once you set up the excel workbook. Once set up, it takes about 20 minutes to complete 90 postcards.

## **ANGELO G. – CHICAGO, IL**

My assistant hand writes the name and address of each prospect on every single envelop. We send out every week a personalized quote letter to 200 potential prospects. We send the letter mainly to owners of properties between 5 and 10 units - and my mailing plan is working quite well.





# REFERRAL SOURCES

*Call your friends - don't ask them for their biz but ask for referrals it turns into both usually.*

**DAN W. -LAKE VILLA, IL**

Develop relationships with mortgage brokers for home-owners referrals and car dealers or salesmen for auto insurance referrals (although usually substandard auto). Develop relationships with captive agents and offer to write policies that they do not have a market for, such as certain commercial policies and substandard auto. Call your friends - don't ask them for their biz but ask for referrals it turns into both usually.

**DAN W. -LAKE VILLA, IL**

Establish relationships with captive agents in your area, find ways to meet them and let them know that you can handle any difficult cases they come across and with confidence that they can trust you not to go after the other lines in the household. Make sure you that you acknowledge the referral and mail them a gift card (I use \$5 Starbucks and usually send 2) for each and every referral. Here's the tip; Do not tell them you are doing this, it's to be a total surprise. Keep this up and you will have referrals each week.

**BILL B. – MARION, IL**



“  
DON'T BE AFRAID TO  
GET CREATIVE AND  
EXPERIMENT WITH YOUR  
MARKETING.

MIKE VOLPE

”

# EXISTING CLIENTS

Provide the neighbor with a written notice just saying that you insure their neighbor and it has your contact information in case of emergency. I have had decent success in the past getting 2 to 4 neighbor names and addresses and phone numbers. Then we call and/or go face-to-face and introduce ourselves and do not try and write then, unless invited, but we simply get their contact info give them ours and just say if anything ever is going on at our insureds and they are not home or out of town please let us know. We have also had neighbors swap keys during this and so forth. Probably 1 or 2 out of the 3 to 4 neighbors turn into prospects.

Another similar idea is call your insureds and ask for 3 emergency contacts. You advertise this again as a free service to your insureds. You send a sheet with 5 spots for emergency contacts with a return envelope. Usually you will get 2-3 back. You then call these people not to sell but to let them know they are an emergency contact for your insured and ask if that is ok. Usually being impressed by this service it will turn into a free referral.

**TONY C. – ST. LOUIS, MO**







# SPECIAL EVENTS

“

GREAT EXECUTION IS  
THE ULTIMATE  
DIFFERENTIATOR.

MARGARET MOLLY

”

**F**ingerprint kits for kids. We have done this with Farmers at events, fairs, and schools. It's a free service - you can find a company that does this to partner with and they take current a photo and copy kids fingerprints.

**TONY C. – ST. LOUIS, MO**

We are currently organizing a chili cook-off for a 400 home new subdivision open house for a lender/realtor team. All of the chili cookers are business owners who have something to do with new homeowners (security systems, plumbing, banking, inspecting, painting, roofing, landscaping, lawn care) and proceeds go toward the school district. The local mayor and high school principal are going to be the judges.

**LISA A. – EDWARDSVILLE, IL**





# NICHE MARKETING



*Go for the workers compensation as a door opener . Owners are just sick with the amount they have to pay for this and it's an area of most pain, and where you can get in.*

**BILL B. – MARION, IL**

I decided to join the Local Realtor Association, just to try it, and that has been the key to our recent success. Most realtor associations have an affiliate group and the majority of the members are mortgage lenders and title companies. When I joined our local realtor association, I was the only insurance agent in the group and I became very active in the organization. It's my goal to be that value added component realtors give their clients by being their personal insurance shopper. Shortly after joining the association, I started networking with a handful of the top producing realtors.

**LISA A. – EDWARDSVILLE, IL**

Contractors: Startups, Roofing, Carpenters, HVAC, and most other contracting classes. I don't shy away from startup companies and do my best to find a carrier that will take them on. They need guidance with the risks they are facing and I work to provide coverage to meet areas that they don't yet understand. Roofing is one of the highest premium accounts that I write; TIP Go for the workers compensation as a door opener (Owners are just sick with the amount they have to pay for this and it's an area of most pain, and where you can get in.)

**BILL B. – MARION, IL**





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