

# The Agent's Bible: Tips That Lead To Marketing Success

Ready to dive into the deep end of the pool? Nothing is more exciting and rewarding than to start your very own insurance agency. It is also a scary time, with the economy, and nothing but bad news on TV.

Do not let that dampen your enthusiasm. This report will provide you ten things that you need to do that will allow you to have marketing success. You may have already done some of these, or have tried some and failed, but if you put 100 percent into doing every single thing on this list, then you will find that they're setting you up for marketing success. Every tip on here is something that you can either do directly or indirectly that will contribute to a successful marketing plan, and will either help you get your business off to a running jump if you're just getting started or if you're a seasoned agent, you can revisit some of these ideas and try again. Successful agents exercise each one of these principles, ideas, and strategies, and if you do too, you'll see how every tip sets you up for a successful future, a strong marketing plan, and of course, a great customer base.



This is not like other guides out there that give you broad ideas and marketing tactics that have been done over and over: it tells you what concepts are behind successful marketing aspects and how each thing can contribute to strong marketing and ultimately, a successful agency. It will get your wheels turning and give you some food for thought as to how everything you do in your agency leads to possible clients: it will show you that literally every step you take along the way is connected to marketing and how you can turn every step into a marketing effort.

# Tip #1: You Must Have a Business Plan

*Before starting any business, insurance or otherwise, you must have a plan.*

If you're wondering what a business plan has to do with marketing: the answer is EVERYTHING. It's the map to what you want your business to be, where you want it to go, and how you want it to get there. All of these things are foundations of marketing success.



A detailed plan will help you stay focused on your goals and give you guidance when you face crossroads and feel unsure of your decisions. You can always go back to your plan and ask yourself which choice will further your goals and objectives. If financing is part of your plan, the lenders will require the business plan.

**Determine your goals and envision your future!** If you don't know where you're going you probably won't get there!

**You have to love what you are doing.** You will be climbing an uphill battle if you are starting up a business just for the money. Excitement and love of your work will pull you through the tough and lean times. Without that enthusiasm and drive, you will be too quick to throw in the towel when things get rough.

Now that you have your vision, goals, and excitement, **put together your business plan!** A business plan is not something you can throw together in twenty minutes. This is going to be a very detailed plan.

**In the first section you have an executive summary.** However, it is best to actually write that last because it will be a summary of the entire plan. It is also the most important part, because the reader will use this paragraph to determine if they even want to read further...so make it count! Capture your audience to make them want to find out more about you and your amazing plans!

When you capture the attention of your audience, they will then read about your business. You will have the basic legal information like the name and address. The best part will be where you discuss the history, how did you get to this point? **Make it riveting!**

**This is where you put the legal information about your business** (name, history, specialties, etc.), and make sure you find something that will set you apart. Study market conditions and give statistics that shows how you will be profitable.

**Following sections will include objectives, short and long term goals, & sales projections.** You will discuss staff and mentors, and marketing strategies. Your threats, the competition, your physical operation and facilities, and vendors will all be discussed as well. Detail the financial section with **your funding sources, projected income, projections for one and three years, and a balance sheet.** You will finish your plan with **your resume and any supporting references** for the information that you provided with your statistics in your plan.

Writing an impressive, professional business plan will allow you to envision what kind of marketing efforts will be best for your business, and basically give you the **“who, what, where, when, and how”** of your marketing campaign. When creating a business plan, it’s also like creating a blueprint for your marketing campaign.

For example, you can use your marketing plan to carefully chisel out who your ideal customer is, and by concluding this, you can figure out what marketing effort will best reach them. Additionally, the finance section will tell you exactly how much money you have to put towards marketing, from which you can then determine how much you should and can spend on efforts like print marketing material.



### **Bright Ideas:**

- **Go to [office.microsoft.com](https://office.microsoft.com) and click on “templates”. Search for a business plan template, and you can download it on your computer! In the future, whenever you’re in need of some marketing ideas, just revisit your plan and remind yourself of who your demographic is, how you can best reach them, and how much money you have to spend on doing so!**
- **Don’t forget to refer to your initial business plan on a regular basis for new inspiration and to make sure you’ve followed through with all your intentions. Review it to see if there’s anything you’re missing. Every year, go over it in detail and create an updated ‘version’ of it for the upcoming year with a large section dedicated to marketing since you’ll have a better idea of what you should be doing marketing wise and how much you can spend on it.**

## Tip #2: Brand Yourself

*Brand is the buzzword for companies in the new millennium.*

Developing and marketing your brand will be involved in most of your functions as you run your business.

Develop a logo that will be on all your letterhead, envelopes, pens, mugs, shirts, etc. You will use this on anything that has your business info on it, so make it count!

**Find a simple, clean logo that simply defines your business.** Avoid flashy, busy logos. Make sure you ask for plenty of feedback from a neutral person. Sometimes an entrepreneur can get so excited about starting their business that they cannot be objective. You need to have a third party look it over with fresh eyes and give their opinion. Make sure you get several opinions from people you trust to tell you the truth.



While the logo is a big part of branding, **you will also need a slogan and a mission statement.** Your slogan and mission statement should all work together to support what you do and your brand. Think Nike: They have the check and a simple slogan “Just do it”.

So much time and effort goes into planning a business that you must make sure you surround yourself with sound business-minded people who can provide you with constructive feedback.

As you search for defining your logo, slogan, mission statement, and marketing strategies, **really take a look at other businesses and outline what you like and dislike about theirs.** It may help guide you more quickly to a brand identity that you will make you proud. Your logo and slogan will give prospective customers their first impression of you, so choose carefully.

You will also need to **find ways to set yourself apart from your competition in your branding.** Maybe you want to be known for your environmental awareness. You can advertise your business as a “green” business. Most of your products you use have been recycled or will be recycled. Your letterhead and envelopes will all be recycled paper.

You install solar panels for heat. You partner with environmental non-profits in the region.

Keep in mind, if a similar business in your area has already done that, find something else. Be an advocate for children by volunteering for Boys and Girls Club, or be a Big Brother or Big Sister for a child. Find something that truly does inspire you. Just like choosing your career, choose volunteer and partnering that will inspire you. Otherwise, it will be obvious that you only do it for the publicity, and people will eventually see through the façade.



## **Bright Ideas:**

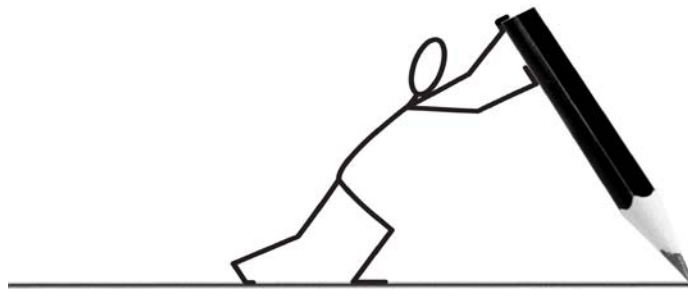
- **Search the Internet for logos and slogans. You can't copy someone else's but it will give you inspiration and get ideas. You'll then be able to show the designer what you like and what you don't, and can create something that will stick in potential customer's minds. Getting a customer's attention is the first step to marketing, and picking a memorable image that sticks out from the rest is the way to do so!**
- **Host a contest through a local college or university to graphic design or art students for your logo to be created, and for an English or Marketing student to come up with some catchy slogans for your business. Not only does this get your community involved, it's a free way to introduce yourself to a large section of the community, including students, and could get some publicity and press coverage for you!**

## Tip # 3: The More You Know, The More You Realize You Need to Learn

*Learning never ends. You will learn every day of your life. Make the most of it!*

You need your CE (Continuing Education) credits, but don't let your education stop there. That is only going to keep your licenses in force; it is not going to make you any kind of an expert.

It is imperative to **soak up knowledge like a sponge**. You should subscribe to industry news, be a part of marketing forums, and go to seminars that will help you learn how to be a better agent or business owner.



You should **find time every day to read or watch something** that will help you learn your products better or understand an insurance coverage that you may sell.

**Plan it in your daily schedule and make it a habit.** Maybe you are not a morning person and it takes you a little bit of time to get yourself geared up for the day. While you are sipping your cup of coffee, take the first 15-30 minutes of the day to read something. Keep an eye out for any learning opportunities.

**Highlight specific products on your website and on your brochures.** Sure, you have a huge selection with many different choices, but guiding your customers to just a couple choices will make it much less overwhelming than trying to decide between pages and pages of information.

Focus on those products with which you feel you have the most knowledge. **Your knowledge translates into confidence, confidence builds trust, and trust builds your customer base!** Remember that the more you're looking for information and seeking education, the more opportunity you have to be recognized by others and to find new marketing ideas. Maybe you've just started selling insurance for classic cars, and on the front page of the paper you see an article about a huge car show that's coming up in a month. This is the perfect opportunity to go directly to your demographic and show off your product. It may not be a mathematical equation you've learned: education isn't just about learning, it's about being informed, so the more education you have, the more you'll be able to refine what you're selling, who you're selling it to, and why you're selling it.

You will quickly become an expert and you can use the knowledge to give you an advantage in the marketplace. Your company develops a new life insurance product with a rider to accelerate payment with a cancer diagnosis? **Be the first in your region to market it!** All the other agencies in your area will be scrambling to keep up, and that is exactly where you want to be.



### **Bright Idea:**

- **Baby Boomers are retiring! Become an expert on Medicare Supplement policies and annuities. Focus your marketing in these areas. Get mailers to senior living communities or to gathering places of seniors, or attend senior events or sponsor them. Try to partner up with nursing/assisted living providers, hospitals, nursing homes, personal care providers, doctor's offices, or other businesses that regularly work with seniors. Again, you're not only reaching out to the people who work with them, you're reaching the seniors and then they're likely to refer your name to others since there's a large sense of loyalty among them.**

## Tip # 4: Bait the Hook: Looking for Customers

*If you don't find customers, you won't have a business.*

When you first start an insurance agency, you will probably get several family members and friends to support you by switching their policies or writing new business with you. Once you burn through that list, you have to have a plan.

**Finding prospective customers is what successful insurance agents must focus on every day.** You have the distinct advantage coming into the business during the world's technological advances. You can harness the power of the Internet and the World Wide Web to reach clients of all types. The International Telecommunication Union cites that over 77% of the US population uses the Internet.

Another advantage of the Internet is working with a reputable leads company. Most of these companies have a solid system set up that alerts you by email or text message when a prospect is searching the Internet for an insurance product.

Once you find the most compatible lead generation company, **you will want to commit to following any new leads immediately.** Often the lead comes in as soon as the prospect clicks on a link. If you are calling them while they are in the process of looking, you will have a much better chance of helping them than if you wait until the next afternoon when they are no longer thinking about it.



However, there is much to be said for good old-fashioned insurance marketing. You must get out and meet your neighbors. Do not think of it as door-to-door sales, **think of it as introducing yourself to your neighbors and being a good neighbor** (no pun intended for State Farm agents).

This will be a big part of getting your brand out there. Don't just offer them your card; offer them a mug, pen, and/or a small note pad with your logo and tagline. You may not get their business that day, but you will be there with them in their home when they dig around for a pen that writes or reach for a coffee mug.



## Bright Ideas:

- Use online resources like HelpAReporter.com (HARO.com) that gets you in front of people who are looking for you. This also helps establish you as an expert, and every customer wants to feel like they're with the most knowledgeable expert. Additionally, consider using a professional online insurance leads company that has proven results. There are some great leads companies that know exactly how to put your business in front of tons of qualified, potential customers that are likely to buy from you.
- Don't underestimate the power of print marketing material. Although we live in the age of the internet, leaving your business cards, fliers, and brochures anywhere you can is a good idea. Take your print materials to businesses you work regularly with, like realtors, mortgage consultants, or home repair companies/ contractors so that they can hand over your print material whenever needed. Also, it may seem like a concept from the ice age, but get your face on a billboard: even if you become known as the "insurance agent on the billboard at the corner of 12<sup>th</sup> and Main," at least you're getting calls from it and have created a name for yourself!

## Tip #5. Reel Them In: Keep Your Customers Happy

*Renewal time should not be the only time your customers hear from you. Birthdays, anniversaries, and major holidays are all times to remind your customers that you are there for them.*

Once you have spent all the time and energy required to get one new client, agents often make the mistake of that being the last contact they have with them. **Don't make the mistake of having your next conversation with them be about why they canceled and went to a different company!**

It's the nature of the business today for customers to shop price. However, you will be working hard to build value in your customers' eyes. **If you don't let it be all about price, you will have a much higher chance of keeping their business.**



There are **several software products** out there that will help you organize and keep a database of your clients. Find one that integrates your email platform, cell phone, or electronic calendar to notify you of your customer's life events. One great software to use is called "Capsule," and you can set reminders, keep notes, and all of your customer's information in one place. It also helps your staff communicate among one another so that everyone stays informed about the current customers, ensuring there are never any communication errors. You can also do things like add a customer's Facebook page and it will automatically import the customer's picture and other details like their birthday, which you can then set a reminder for and have it sent to your email on a certain date and be ready to make a phone call or send a card!

If you live in a small to mid-sized town, **make sure you are reading the local newspapers**. If you see that your client has gotten married or had a death in the family, jot them a handwritten note of congratulations or condolences.

If you see that one of your customers is about to get hit with an increase in premium, don't wait until they get the letter from corporate headquarters. Call them. You are going to turn this client from a price shopper to a thankful customer before they even know what's happening.

"Mrs. Price, I'm calling you today because I wanted to discuss your auto policy, do you have a moment? Great! Well I wanted to discuss a great program that is offered through XYZ Insurance called "Drive Alive" and it is geared towards your teenage son, Eric, who just had an accident. If Eric will agree to complete this program, you will receive a 20% discount on your rates, and it will help offset the increase you will get from that accident."

**Turn a sticky situation into a great customer experience.** You haven't sold Mrs. Price anything other than a solution to the problem she doesn't even know about yet. She will think that ABC Company would never have called her to help her out in that way, so she will become loyal to you and your brand!

Overall, remember that **word of mouth is the strongest marketing tool**: if your customers are satisfied, they're absolutely going to tell others about their great experience with you. Regardless of whether it's a new bread, a spa, restaurant, laundry detergent, or insurance agency, people tell others when they've found a great product, so make sure YOU are the product they're telling others about and you've then got an easy marketing tool working for you: your own customers!



### **Bright Idea:**

- **Forget about sending Christmas cards. Everyone does that. Send out Thanksgiving cards and New Year cards instead. You will be in the face of the customer (or potential customer) before everyone else, and then long after Christmas cards are in the trash, your face will pop up in front of your audience again!**

## Tip # 6: Bask in the Limelight: Be Visible

*Once you set up shop, it is imperative to make your presence known. You cannot hang a sign then sit behind your desk and expect people to line up at your door.*

This next step ties in with your branding; **find ways to be relevant and be current.** You want to have a strong and positive presence in the community, and that will not happen just by hanging a sign over your storefront and sitting behind a desk. This is going to take work, and a lot of it.

But don't shy away from it! That is why you are reading this report. **You want to stand out. You want to succeed. You will do what it takes to make it happen.**



Every town has their own types of gatherings. If you do not know what they are, call the local chamber of commerce and have them direct you to the information. **Be in the middle of whatever is going on.** Parades, festivals, fairs, art shows, school functions...find ways to be a part of it. If it's in your budget, consider sponsoring an event or something else so that your name is out there.

You don't always have to set up a display but **you should always have a personal presence.** Talk to people, be a smiling face. Don't sell while you are mingling, that will just cause people to avoid you. Ask them about their families and their hobbies. People love to talk about themselves. If you have a hard time coming up with things to say to people, just start asking questions about them, and once you find their passion, get them to talk about it.

Look for opportunities to speak or be on a board. Be part of a professional discussion panel. Take the initiative and offer workshops. Attend city hall meetings to keep a pulse on your town.

**Get yourself published.** You don't have to write a 300-page book, just write informative and relative articles to publish in online or print insurance trade publications. You can also write articles and place them on article directories, which is

usually free. In the bio section of these directories, you can put your agency's information with a link to your website. This will also help result in higher traffic.

Highlight those accomplishments in your newsletter and on your website. This will only grow your confidence, and people will want to align themselves with someone who has proven to be knowledgeable and successful.

**Sign up for panel discussions as an expert for insurance.** Don't hesitate or be afraid to put yourself out there. You have grown in knowledge every day use it!



## **Bright Idea:**

- **Send out a newsletter via email. You can collect email addresses by having a sign up sheet at the front door with a candy dish to draw them to it, and always remember when talking to a lead or current customer to get their email address. Creating one is simple: Word has templates that make it easy for you to fill out and print. Visit Article Directories online to find content or have your own content written, including information about your agency. Start out with a quarterly publication. If you seem to get enough interest, make it bi-monthly.**
- **It may seem like a caveman's idea: but sending out a paper newsletter may be the way to go too depending on the size of your agency and its demographic. Since so many companies now only send out e-newsletters, yours may be more likely to be read if it's a tangible piece of mail that they have right in front of them! Ask customers what their preference is, particularly if you have a lot of elderly or disabled customers.**

## Tip # 7: You Don't Have to Marry Them, Just Court Them

*You have learned to develop customer relationships, but investing in B2B (Business to Business) long-standing relationships can bring in many new prospects.*

**Join local professional groups.** These groups typically get together once a month or once a quarter to provide networking opportunities. Rather than having each one of the members invent their own wheel, as a group you are creating a learning environment where information is shared.

Almost as helpful as being a member of a professional group is to develop relationships with other local business owners who are not part of the group. The coffee shop owner down the street wants more customers, too. Make it a point to have coffee there once or twice a week and strike up conversation. It doesn't even have to always be about business. **The point is to develop relationships.**

When the coffee shop owner overhears someone who is looking for insurance, he will remember you and give you a referral. Of course, you would also want to refer folks to his or her business. Develop trust between other business owners and be a referral system for each other.

Any of your B2B friends that have websites (and most of them will) you should offer to put a link on your website for them and see if they would be willing to do the same for you.



You will want to **brush up on your business products as well.** If your coffeehouse friend casually asks about business insurance, you can at least have enough knowledge to hold a conversation about it. Then set up a time when you can come back and show him what you have available for him. Go to him, do have him come to you.

This is another great way to generate more website traffic and interest. When a local person is perusing your website, once they are done looking at what you have to offer, he or she may click on another local business site that offers another sought out service. Most people prefer to do business locally, make it easy for them to do so.



## **Bright Idea:**

- **Create your own professional group, like a business leads group just for your city or county! Design a group environment that supports growth opportunities and meet weekly. Have members share what they learn about marketing and help each other out. Work to get referrals for each other and share these referrals at each meeting. Try to get one professional from all kinds of industries, so in situations like the aforementioned, when the owner of a coffee shop hears that someone needs insurance, the owner could get the name and number of that person and pass the referral on to you at the weekly meeting. Everyone supports everyone and works to promote each other, so it's like having a built in marketing team with eyes and ears all over the place!**

## Tip #8: Take Advantage Of Internet Marketing Tools!

*As a serious insurance agent specialist, you do not want your website to look like child's play.*

A huge part of your marketing plan needs to include a great website, blog, social media campaign, and essentially, anywhere and everywhere you can utilize to build a strong internet presence. A recent consumer report stated that **approximately 80 percent of consumers first look for local insurance agencies online**. If you're everywhere and anywhere you can be on the internet, you have a greater chance of this 80 percent finding you when they're looking for an agent in their area.

**You can hire a website designer or do it yourself** through easy to use Content Management Systems like WordPress.com, where you cannot only create a blog, but a full website. If you can afford it, investing in a website developer is ideal, as now your internet presence needs to be top of the line. If you do it yourself, make sure you're confident in doing so and that you know what you should have on your website. In addition to basic information like your location, what products you sell, and contact info, make it a useful website that people can come to when they have a question or need a quote. **Incorporate a blog into your site** and also include other articles and information, as all of this will help you climb the search engines.



Speaking of search engines, remember that there are professionals out there who do nothing but create optimized content and material for websites and blogs. Again, if your budget allows for it, utilize the services of a copywriter who is well versed in insurance copywriting and who practices great **search engine optimization (SEO) and search engine marketing (SEM)** skills. Remember, the internet isn't just a playground anymore: it's a place where solutions are found and problems are solved, so make sure you include plenty of time or money in your business plan for strong internet marketing and invest all you can into it.

You will want to **create a Facebook page and Twitter account**, as well as blog and social media bookmarking sites. You can even set up a podcast now with a variety of companies, so you could perhaps do something industry focused or sponsor a podcast.

To drive more traffic to your website, you will want to create a blog and anytime you post a new blog, you will want to provide a link on your Facebook page, website, social bookmarking sites, and Twitter.



Put it in your schedule to **update each of these on a daily and weekly basis**. Direct your readers to your website and your website traffic to your blog, and utilize platforms like Twitter, Digg, or StumbleUpon to work in the cycle as well. Eventually, you'll find they all work together in a complete circle, promoting each other and leading all visitors to the one thing that's most important: you!

Additionally, **set up an "internet marketing schedule"**. Make sure that you or your staff do the following on a certain basis:

- Add a new blog at least once a week, and then make sure to update your Twitter account, Facebook and Myspace page, and social bookmarking sites to share the new blog's link.
- Update Twitter at least once a day: pick a time of day and always 'tweet' at that time so you don't forget. You can of course 'tweet' as much as possible: share blog links, other useful links, referrals to other industry professionals that you've created partnerships with, important milestones, agency news and events, useful tips, and more. Perhaps pick
- Get a great template for your Facebook page: they're no longer just plain pages, and you can make yours stand out by getting a great template and including your logo. Update Facebook regularly with the same information you've tweeted, but also utilize the fact that you can share pictures easier, have more room to write, and most importantly, use Facebook as a tool to communicate with current customers, other businesses, and potential customers! Start conversations by asking a question or jump in on other conversations (just make sure you've selected to "Use Facebook as "business name" and not your own personal page.)

**Remember it is all about promoting your business!** The more you utilize all the fantastic tools available on the internet (which are mostly free!) the more you'll climb the search engines and ultimately end up in front potential customers.

**Make every word count!** The headline often will determine if the reader wants to even stay on the website, blog, or whatever other platform they've found you on. Additionally, remember that you only have about FOUR SECONDS to make an impression on the visitors: you have to make sure that you get straight to the point and provide the answer or solution to the visitor's question, which is what the internet is all about: providing answers and solutions to questions and needs.

You also must be sure to **use proper grammar, spelling, and punctuation**. If that is not one of your strong points, have someone edit it for you or completely write it for you. You do not want to come across as uneducated because you mix up the usage of there, their, and they're.



## **Bright Idea:**

- **If you've created strong, dedicated partnerships with local businesses, perhaps pick a certain day of the week that you all promote each other on Facebook, Twitter, and other social media platforms. Perhaps every Monday you all can promote one another by tweeting about the other, sharing a link to the other's website or blog, or whatever else you feel is needed. This triples your exposure and again is FREE marketing!**

## Tip #9: Invest in the Community

*Nothing will say “love” to your customers as much as being someone who avidly supports the community.*

Stand out as being the person that is approached for pulling together fundraisers and drives.

If you have a storefront with a changeable sign, make sure that you are featuring your latest project on it. “Drop off your canned food for the food bank here,” or, “your old coat too small? Drop it off here for ‘Coats for Kids’”.

**You will have people come to you based on that type of leadership and empathy.**

Teach a skill to a battered wife. Read a story to a group of orphaned children. Help your widowed neighbor bring in her groceries. There is no end to what you can do.



The best part? You are the one who will be blessed by it. Sure, you will get more customers as a result, but your good deeds will build your self-esteem. **When you start helping those who are less fortunate, you realize how lucky you are and can be content with what you have.**

Another great marketing/community tip would be to **work with a local school, college, or university** to be a mentor to students who participate in marketing or business classes. Not only will you have future customers in there somewhere, you will be getting attention of parents.

Send the student home with materials that are geared for learning, but include information about your business as well. The parents may see the information, which will give you more exposure.



## Bright Ideas:

- **Be a drop-off point for Operation Christmas Child, a Samaritans Purse project.** Encourage your staff, family, and friends to fill a shoebox with items that will help a child somewhere in the world that has never had a Christmas present. OCC will supply you with all the marketing materials and information that you need. You could also be a drop off point for other charities or have food, clothing, or school supply drives.
- **Sponsor a charity or host your own:** choose a charity you want to represent and then create an event or something else around it to not only involve current customers but to get the attention of new ones. For example, partner up with the local humane society and host a month long event during which your agency will donate \$5 to the humane society for every quote received during that time. Not only will you get attention before and during the event, but you're likely to get attention to when it's over and you've signed over a large check to that charity! This is a great way to not only get your name out to the people involved in making it happen (such as the organization's employees) but to their customers, and often it can bring press coverage as well since it's unique!

## Tip #10: Invest in your staff

*If you are fortunate enough to have a staff, treat them like the assets they are.*

**Nothing will damage your reputation faster than being a jerk of a boss.** All the hard work you put in with the community, groups, other businesses, and all your marketing will be for naught because of a poor reputation from your staff's point of view. If you treat your staff well, they're more likely to believe in your product, which means they'll be more enthusiastic about selling for you and being demonstrative of your services and products.

If they're enthusiastic, customers are more likely to believe in what you're selling. The same way it's important to keep current customers happy, it's just as important to keep your staff happy. It may not seem realistic, but miserable employees WILL tell others not to buy from their company if they're extremely unhappy, and consider one of the principle lessons of "Marketing 101": **word of mouth is one of the strongest selling points, so your employees have influence over others.**



Provide your staff with the guidelines they need to do their job. **Be clear about expectations, roles, and opportunities.** Give them everything they need to succeed. Then let them do it and provide recognition when they've done it, especially if they go above and beyond.

**Provide a fun, safe working environment.** Allow for incentives and contests. Being a great boss is going to be its own marketing boon because you will have created a positive environment that your staff will be proud to market for you.

Once you have developed your staff, allow them opportunities to market for you. Let someone who seems to be savvy write an article for your newsletter. Perhaps one employee is great at talking with people and keeping a conversation going: have that employee make 'reminder' calls or 'birthday' calls.

If one employee has a passion for putting together events, give them the duty of putting together an annual open house. Recognizing your employee's passions will allow the employee to shine, which will make the employee WANT to be there for you.

Take their pictures and feature one employee at a time on your newsletter. Personalize your staff to the community so that they will be a familiar trusting face.



## Bright Idea:

- **If you have a larger staff, have a friendly 'marketing' competition. See which staff member can get the most leads to call for quotes, and then whoever has gotten the most referrals can get some kind of prize, like a giftcard or maybe a 'ticket' for a paid day off. You're not only giving your employees something in return for their performance, you're likely to have some strong marketing efforts going on!**

There are many opportunities for marketing your agency. This guide is just a starting point. Keep abreast of all the new things out there for business owners, and be sure to customize any marketing campaigns to meet the needs or questions of your potential customers.

Being a part of the community, branding, blogging, networking, and creating a creative and fun work environment is going to take a massive amount of work on your part. However, the rewards you will reap from it will make up for the short nights and long days.

*In the words of Zig Ziglar, "You don't have to be great to start, you have to start to be great."*