



SECURE AGENT MARKETING

SCALING YOUR AGENCY



WHAT DOES SCALING YOUR AGENCY LOOK LIKE?

You alone can only take your business so far...

To scale your agency, you need to implement these four concepts:

- 1. Growth Mindset**
- 2. Scalable lead flow or defined lead portfolio**
- 3. Authoritative online presence through digital assets**
- 4. Development of a seamless recruiting process**

LET'S TALK ABOUT MINDSET:



Too many agency owners and insurance professionals are stuck in the “employee” mindset. In order to scale your business to its fullest potential, you need to adopt a “growth” mindset.

- It's easy to be complacent, but that's not going to get you anywhere.
 - “Complacency is the last hurdle standing between any team and its potential greatness” - Pat Riley, Former NBA Player, Coach, and now President of the Miami Heat
- Don't fall into the “it's good enough” trap - There's always room for improvement and growth in this industry.
- Don't be too prideful - Your agency isn't perfect - If you think it is, ask other people to assess your business and provide input

GROWTH MINDSET

A growth mindset can easily be identified by the way an individual views an investment. You can still invest in your business without seeing an immediate return (although you're more likely than not to see a return in the long run). Once you've shifted your thinking, it's time to start investing in...

- **Scalable lead portfolio**
- **Authoritative Online Presence through digital assets and content marketing**
- **Development of a seamless and effective recruiting process**

Keep scrolling to learn more about each of these investments and how they work in conjunction to take your insurance business to the next level!





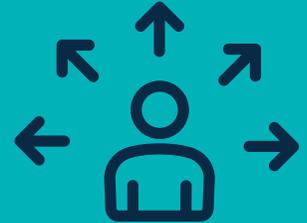
SCALABLE LEAD PORTFOLIO

The first investment you need to make in your insurance business is a **scalable lead portfolio**. For the greatest chance of success, combine paid and organic strategies.

PAID



- **PPC** - Pay per click traffic to a website or landing page using Google or Facebook
- **Pre-booked appointments** - The shiny new lead type of the industry, check out last month's live training for more information on these
- **Live Transfers** - 100% contact rate leads sent directly to your phone when you want them
- **Callback leads** - qualified leads that are waiting to receive your call
- **Aged Leads** - 2 to 90 day old leads that have shown interest
- **Facebook** - Leads generated from branded Facebook campaigns
- **Google** - Leads generated through Google using Keyword research
- **Direct Mail** - Leads generated from physical mailers



ORGANIC

- **Referrals** - Leads generated from current clients or other word of mouth marketing
- **Website Leads** - Leads generated from organic traffic to your website
- **Social Media Leads** - Leads generated from your social media posts

WHAT'S THE BEST LEAD TYPE TO SCALE AN INSURANCE AGENCY?

That depends on you!

Leads are an expertise of ours at Secure Agent Marketing. If you're having trouble acquiring enough leads to take your business to the next level, give us a call or book an appointment and we'll help you down the right path.

Leads aren't all you need though, keep scrolling for the last two investments you need to make in order to scale your insurance business to the next level!!



LET'S GET STARTED

Let's partner to create a strategy tailored to you and your business. Scan or click the QR code to book a FREE appointment with one of our strategists.

CONTENT MARKETING STRATEGY

The best way to generate organic lead flow is to have a carefully thought-out content marketing plan. Content marketing can be broken down into website development, asset development, and social media presence.

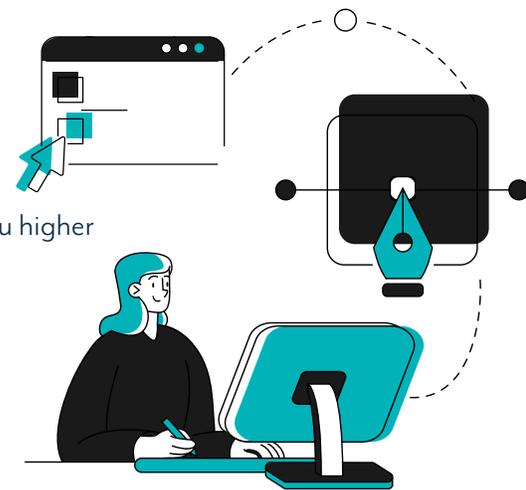
WEBSITE DEVELOPMENT

A website is essential in today's insurance industry. You need a website in order to establish brand authority and credibility. How often do you do business with people you can't find any information on?

Not only does a website establish credibility and authority, but it's also the central hub for your digital presence. The head of the octopus. A website should be built to **educate your customers**. We say it all the time - People do Business with People who educate them.

When done right, your website can be used as a lead generation tool.

- Increase Traffic and potential conversions
 - Invest in a SEO Strategy
 - Invest in PPC strategies
- Give people a reason to come back and google a reason to rank you higher
 - Continually add content to your site
 - New pages
 - Blog posts
 - Videos
- Give your website users AMPLE opportunity for conversion
 - Lead form placement strategies
 - Appointment booking links - leads can schedule on their time
 - Multiple forms of contact



ASSET DEVELOPMENT

Having a developed set of assets at your disposal increasing your credibility and authority in the market - especially when most of your competitors have a website at most. Some of the most effective assets in the insurance space are:

YOUTUBE CHANNEL/VIDEO LIBRARY

- Builds authority
- Adds personality
- Creates a sense of familiarity



BOOK

- Massive authority play - Try handing someone a book you wrote instead of a business card and not earning their respect
- List it on Amazon, include it on your website, pass it out at seminars
- While writing a book is a big upfront investment, all you have to do is write a few policies off it and it's paid for itself

Leads and assets are going to take you far, but there's one more piece of the puzzle that we'll address on the next page.



SOCIAL MEDIA PRESENCE

When it comes to social media presence, consistency and realism is the name of the game. You can't expect to gain traction or organic leads if you only post a few times a year. Follow these tips if you want to expand your presence and grow your following, and by extension, your organic lead potential:

BE CONSISTENTLY PRESENT ON SOCIAL MEDIA

Post 3-5 times a week on multiple platforms

BE A HUMAN, DON'T JUST HAVE SOFT SALES PITCHES AND PRODUCT DESCRIPTIONS

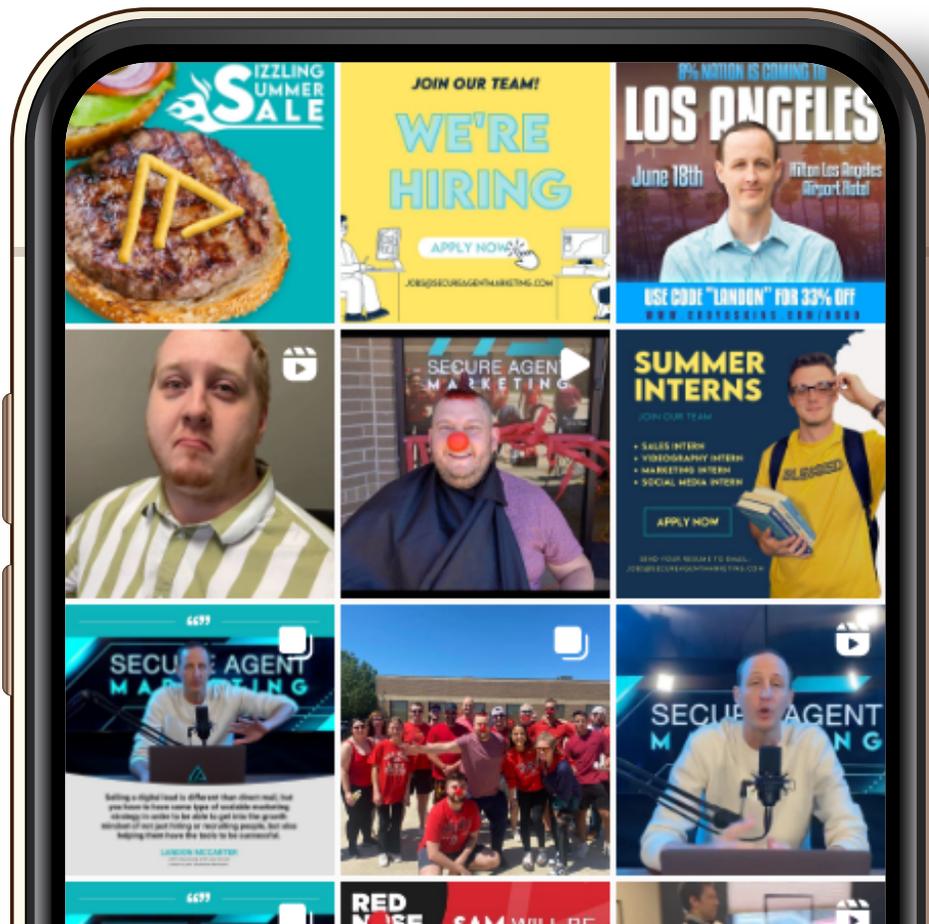
Show what you like to do - hobbies, personal wins
Showcase your employees - testimonies, accomplishments
People want to work with PEOPLE

MAINTAIN YOUR PRESENCE ON:

Facebook
Facebook groups
Instagram
LinkedIn



When you use all three content marketing strategies in conjunction with one another, you're going to see a massive difference in the sentiment of your brand and the pace at which you can grow. The final investment you need to make in your insurance company is a seamless and effective recruiting process. Read on to the final page to learn more about what that process should look like!



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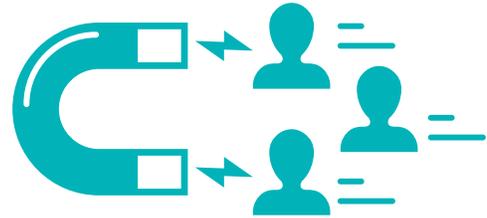


RECRUITING PROCESS

We said it at the beginning, but you can't grow your business alone. You need a team behind you, but you can't get a team simply by asking. You need to deploy an effective recruiting strategy that will allow you to seamlessly attract, hire, and train a killer team of agents and staff that align with your vision and can help take you to the next level. Let's break down the process:

ATTRACT

You can't build a sales team if you can't attract potential new agents.



HIRE

You can't do anything big alone. There are two types of people you need to be hiring. Sales people and administration.



1. Sales People - If you want to grow your business and grow your sales revenue, you need more hands on deck that are working the leads, getting referrals, and generating revenue for your business while earning a living for themselves. If you're serious about growing your business, you need to be constantly recruiting and hiring sales people.
2. Administration - Admin are crucial to getting new agents to the RTS or Ready to Sell status. Invest in admin as needed. They are crucial to processing new agents with carriers, licensing, and onboarding to get them ready to sell.

Hiring employees will do nothing for you if you don't follow the third step in the recruiting process -

TRAIN

Training new employees, specifically sales people, is essential to retention and scaling.

Remember, you can't do this alone, and we at Secure Agent Marketing want to help you get to the next level where you belong. We want to be on your team.

We offer a recruiting funnel platform that varies in complexity starting at \$1000 a month. For that, you get:

- 50 licensed or unlicensed prospects from across the nation
- AgentPilot CRM Access
- Custom Automations designed to generate initial interviews on your calendar
- A marketing team of 50 employees on standby to help you adjust your strategies and methodology as you continue to scale



We also offer more advanced recruiting funnels with various marketing strategies built in to drive more qualified prospects to your calendar and inbox. If you're looking to scale your business, give us a call or scan the QR code below to schedule an appointment with one of our marketing specialists!