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# MARKETING CHECKLIST: INDEPENDENT INSURANCE AGENTS & BROKERS

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## MARKETING CHECKLIST FOR INDEPENDENT INSURANCE AGENTS & BROKERS

Selling insurance can be a challenging business. Whether you're in the personal, commercial or specialty lines of business, or a combination of them, there are many challenges to growing and maintaining a solid book of business.

With this in mind, we have developed a marketing checklist expressly for independent insurance agents and brokers. This checklist assumes that your independent insurance agency or brokerage has been in business for several years and is not brand new. This means you have many happy clients, you have a somewhat established name, you have a website and a couple of employees. We are also assuming that you are either looking to expand the business or you want to rethink your marketing to take your business to a whole new level. Either way, you are looking for some tips and tricks to shake things up and produce some results.

If that's the case, this **Marketing Checklist for Independent Insurance Agents and Brokers** is for you. This applies whether you are focused on personal or commercial lines or both. This guide will help you evaluate several key elements of your marketing, and help you pinpoint where your marketing may benefit from some new thinking.

Here you go:

### 1. Define (or redefine) Your Target Market

Whether you're entering a market, or have been in business for decades, knowing exactly who your target market is, and making a plan to go after that market, will have a big impact on the success of your business. Many insurance agents and brokers assume their customers will find them, or think they can serve anyone, and overlook this very important step of intentionally choosing a specific market segment to go after. With so much competition, it can be very difficult to simply be another generalist.

If things are stale or sales are sluggish, one thing you can do is to look at where you may have had success in the past. Or, don't hesitate to target a new audience or industry and see how well you do. As widespread as the insurance industry is, there are people and companies out there with a need for your services. Becoming an expert in a particular

industry or type of insurance and then becoming known as an expert, can take your business to a new level of sales!

Things you'll want to consider when defining a unique target market:

1. Industry Category & Size
2. Coverages
3. Unique Characteristics, Risks & Exposures of Industry Category
4. Industry Premium Volume & Loss History
5. Leading & Niche Carriers
6. Competitors
7. Any other criteria that help define category

Create a Target Market Profile identifying the key characteristics and needs of your chosen market. Your Target Market Profile will provide clarity to how you use social media and other marketing efforts to reach your existing or new audience.

## **2. Establish/Update your Website**

With your target market(s) clearly defined, update/rebuild your website to address the unique needs and interests of your target audience. Your website is the backbone of your marketing. It's where your target audience will learn about who you are and what you offer. It is important to have a professional website, with accurate, current information, and even more important to pack it with engaging content directed expressly at your target audience.

Your website should reflect your brand, and can showcase your company culture. Remember that many (if not most) people will be viewing your website on a phone or tablet, so make it mobile-responsive.

Perform a [Search Engine Optimization \(SEO\) audit/review](#) to ensure that your website is appropriately set-up to be found by the important search engines (primarily Google and, to a lesser extent, Bing) for searches related to your target audience.

[Get a Free Website Analysis Report from Endorphin Advisors](#)

[Install Google Analytics](#) on your website. This powerful, free tool will provide a level of insight into your website visitors and help guide your future marketing initiatives. You can see exactly who is visiting your website, how long they are staying, how many pages they are visiting, which pages they are reading, where they are leaving from, and much more detailed information. This is tremendously valuable information which can help guide your content development and your website design to help generate traffic and capture leads.

### 3. Focus on Digital Marketing

Take advantage of the fact that people are turning to the Internet for information and insight before making purchasing decisions. Use the tools available and be where people are already spending their time. It's cost effective, too.

**A) Social Media** – With social media, select social platforms that will offer the most value for your business. For insurance agents and brokers, we would typically recommend building a presence on platforms like LinkedIn, Twitter, Facebook, Instagram and YouTube. Each platform is different as to what type of content works best and when it's best to post content. Do some research to see when your target market is most likely to be in front of a computer or phone and plan your posting accordingly. Consider [using a social dashboard like Hootsuite](#) which aggregates your social profiles on one dashboard and delivers many advantages including the ability to schedule your social posts in advance.

**B) Email** – Studies still repeatedly show email to be one of the most effective marketing tools. Keep in mind that many professionals receive dozens and sometimes hundreds of emails daily, so it is important to provide concise and noteworthy content. Engaging content sent to the right people, at the right time, will not only keep loyal readers coming back, but attracts new viewers. Consider [email automation strategies](#), too. While there are many benefits of using email marketing, one statistic to remember is that for every \$1 you spend on email marketing, you can expect an average return of \$38. That's a great ROI!

**C) Video** – The [use of video](#) continues to grow in importance in marketing. As digital marketing continues to evolve, more and more trends favor video, even for fields like insurance agents and brokers. Think about customer testimonials as well as videos explaining specific areas of coverage or claims processes, for example. You don't want to miss the boat, incorporate video into your marketing strategy immediately! Whether it's a professionally-produced video, quick videos shot with a cellphone or a slideshow with voice-over, you are sure to see an uptick in your content's visibility (and growth in website traffic). Want a powerful stat? Organizations that use video in their marketing grow revenue 49% faster than those that do not use video. That's a powerful stat! Video can consist of professional video, live-stream video, or [Content-Driven Video](#).

**D) Content** – Content is king, and that includes social posts, blog articles, website content, ebooks, brochures, videos are more. Make sure your content is relevant, newsworthy and informative to your audience. Lastly, make sure your written content is also easy to read by using bulleted/numbered lists and graphics.

#### **4. Get involved in, and support, your business community.**

Business owners like to support each other. They also support businesses that support the local community. Whatever type of business your agency or brokerage focuses on, getting involved in your local business community can benefit your insurance agency or brokerage in many ways. Check out your local chamber of commerce, professional associations or business groups sponsored by your city as these can all be great for networking and building connections for your business.

Additionally, think about getting your business involved in the local community. Not only will it improve your brand's image, but employees like to work for companies that support their local communities. Perhaps your company can sponsor a local baseball little league or team or similar community organizations.

## 5. Planning & Measuring Success

Building a successful marketing strategy does not happen overnight. Those who take time to create a written plan, do research, and regularly analyze data and performance metrics are more likely to reach their goals. This includes

[creating and reviewing on a monthly basis financial projections](#) for the insurance agency or brokerage.

There is a lot that goes into a new marketing strategy, but these five key areas should help you re-energize the marketing for your Independent Insurance Agency or Brokerage.

[Contact Endorphin Advisors for help with your marketing](#)



## ABOUT ENDORPHIN ADVISORS LLC

Endorphin Advisors LLC is a unique, full-service consulting firm offering strategy solutions and digital marketing services. Since 2005, we have specialized in marketing strategy, web design and digital marketing. We also offer branding, content marketing and strategic planning.

In marketing technology, we enjoy close working partnerships with industry-leading companies including Constant Contact, PromoRepublic, Results CRM, Abacus Next, APC Cloud, Robly, Hootsuite and more. These important relationships help us stay on the cutting edge of marketing best practices and technology innovation/solutions.

Our clients engage us for our knowledge of business, our passion for marketing and our love of technology. We specialize in working with professional services, technology and distribution firms.

We have deep expertise in the following areas:

- Web Design/Development
- Search Engine Optimization (SEO)
- Video
- Content Marketing
- Social Media
- Email Marketing
- Customer Relationship Management (CRM)
- Marketing Technology & Training
- Branding & Identity
- Growth Strategy & Business Planning



We invite you to request a free consultation with one of our experienced marketing advisors. Please contact us via email at [info@endorphinadvisors.com](mailto:info@endorphinadvisors.com) or by calling 518.250.9035.

Please visit us at [www.endorphinadvisors.com](http://www.endorphinadvisors.com).