



## Fast Start Marketing to Success for new Risk Management Advisors;

### New Advisor Bonus:

### 50 Proposals & 5 Policies.

**Get your 1<sup>st</sup>- 50 proposals in the system within your first 30 days, with at least 5 bound policies & you will get a \$500 bonus!**

### 32 Ideas to get rolling!

1. Run proposals on **YOUR OWN INSURANCE**.
2. **Have a servant's heart.** The best way to make it big in this business is to put the needs of others in front of yours. You will reap what you sow!
3. **Remember SPEED BUILD'S TRUST.** Remember this simple statement, "Speed builds trust." When you are working with prospects & clients, Speed is one way to build trust.
4. Promote our **AMAZON GIFT CARD CHALLENGE**- For the opportunity to run a custom proposal for a client, we will give them a **\$17 Amazon gift card** IF we cannot beat their current rate. See details at <https://www.GetStrategicIns.com/amazon-gift-card-challenge/>
5. Utilize LinkedIn & check out Lead Leaper to get a contacts phone or email. <https://leadleaper.com/>. View my YouTube video on this online. Connect online & grab coffee offline!
6. Get involved in **networking Groups/Leads Club** info: Business Networking Int'l ([www.bni.com](http://www.bni.com)), Meet-up Groups that specializes in Real Estate. (<https://www.meetup.com/find/career-business/>), NPI, Ali Lassens, LeTip & more!
7. **Cole X Date Software:** Home & Auto Insurance Expiration Date information- start by running searches close to where you live of homes you would LIKE to insure. Call, email, text to get in front of the prospects. [www.colexdates.com](http://www.colexdates.com). Login: **dlevi** Password: **John1010!**

8. **FMAP. Florida Market Assistance Program.** FREE homeowner's insurance leads through the state of Florida/Citizens Insurance. That's right you heard correctly. Check it out on our RoboForm manager. <https://fmap.citizensfla.com/fmap/login.do>
9. [www.realtor.com](http://www.realtor.com) & [www.Zillow.com](http://www.zillow.com). start by running searches close to where you live of homes you would LIKE to insure. Reach out to the realtor via email, text, or phone call to offer to run proposals for their listings.
10. **Realtor Pitch Sessions** (Google Realtor Pitch Sessions near me; these are often FREE meetings where realtors gather to "pitch" their listings to other realtors. You will often find other centers of influence there (Mortgage brokers, Home Inspectors, Title Contacts) that could also become YOUR contacts
11. **PSP- Professional Sellers Program & Create your own raving fans of COI's (Centers of Influence).** Reach out to the REALTORS, MORTGAGE BROKERS/BANKERS, FINANCIAL ADVISORS, ATTORNEY'S, CPA'S you ALREADY KNOW. Network with other local advisors to offer YOUR insurance services (home, auto, flood, boat, umbrella) to THEIR clients/prospects. These can be some of your BEST contacts.
12. **Network with some of the top Realtors in the USA!** We have access to reports from REAL Trends Magazine which ranks top realtors throughout the USA. Get creative. Reach out. Look to create some new relationships. Info on our Dropbox- Marketing- Real Trends file.
13. **Network with CAPTIVE Insurance Agents.** Don't look at the people at State Farm, or All-State as your competition, but rather potential referral partners. Think about this. They are captive for auto (and most of homeowner's insurance). So when THEY get a client that they can't help (perhaps due to claims history, or not competitive) where do they refer them? That could be you. AND YOUR/OUR commitment to them is we mark their file NOT to prospect for other lines of business they may already have with that company.
14. Engage with those people/businesses **where you are ALREADY spending \$\$\$**. Think about this. Each week you are spending \$\$\$ on things like dry cleaning, Starbucks, meals out, gas, barber/hair dresser, gym, etc etc. Keep a stack of your business cards handy with you & give them out. Remember one of the advantages of this business is EVERYONE you come in contact is ALREADY PAYING for and NEEDS what you can offer (auto & home insurance).
15. Get involved in your **local Chamber of Commerce**.
16. Every time you run proposals for someone **REGARDLESS of the outcome ASK THEM for a referral.**
  - a. WORD TRACK: For clients you write insurance for you can say, "I'm looking to grow my business with other great clients like yourself thru referrals. Who else can you think of

that may be interested in a policy review & taking our Amazon Gift Card Challenge? (IE. Friends, family, neighbors, co-workers, etc etc).

- b. WORD TRACK: IF YOU are NOT able to write the prospect you can say, “Thanks for the opportunity to review your insurance. I’ll pend your info in our system & follow-up with you pro-actively, closer to your next renewal. I’ll also send your info to our Operations Mgr for your Amazon Gift Card. What’s the best email or cell # for them to send it to? Lastly, I’m looking to grow my business with other great people like yourself thru referrals. Who else can you think of that may be interested in a policy review & taking our Amazon Gift Card Challenge? (IE. Friends, family, neighbors, co-workers, etc etc).
17. IF YOU want to **BUY leads**, you can do that through a # of different vendors including Contactability, Hometown Quotes, Quote Wizards, InsuranceQuotes.com, NetQuote & Insuranceleads.com...  
[https://www.insurancesplash.com/leadfinder.html?cf33=Homeowner&cf36=All+Lead+Types&cf35=Florida&Itemid=356&option=com\\_mtree&task=listall&sort=-link\\_rating](https://www.insurancesplash.com/leadfinder.html?cf33=Homeowner&cf36=All+Lead+Types&cf35=Florida&Itemid=356&option=com_mtree&task=listall&sort=-link_rating)
18. **X Dates/Lost Souls from OUR agency**. You can ask our Operations Manager to pull you a report of X Dates & Lost Souls from our own agency files. Email [info@GetStrategicIns.com](mailto:info@GetStrategicIns.com) for details.
19. **Facebook/Social Media Marketing**. Everyone you know is on Social Media right??! It’s one more place where people, “hangout,” & so you have opportunities to offer the \$17 Amazon Gift Card Challenge, Private Message people, etc. Want more ideas of WHAT TO POST?? Follow us on Facebook & repost to YOUR page. Some good ideas from Insurance Splash on FB Marketing.  
<https://www.insurancesplash.com/facebook-marketing-ideas-insurance.html>
20. **Distribute White Papers or Information Reports**. We have several of these on our Dropbox file. You could print, or email these out to offer something of value in return for helping the prospect out with a review of their home & auto insurance.
21. **Drop in to real estate & mortgage offices** with some goodies. People do this ALL the time & don’t kid yourself it make take some work, but it can still be very effective. The idea behind this is to be consistent. Pick 10 realtor/mortgage offices near you that you would like to build relationships with & then make a “route” where you go & visit 2-3 each week. You can drop off fruit, donuts, pretzel bags, avocados, whatever you want. Get creative. Bring cards. Look to build relationships. Ask open ended questions like, “What help would you like to see on insurance that you aren’t getting now?”; “Who are you currently referring for insurance?” “How’s business going?” Honestly there’s no secret to this. It’s being honest, genuine & consistent.
22. **Sign up for Insurance Marketing Ideas or content thru companies like Insurance Splash**. [Click Here](#).
23. **Don’t forget about...BOATS, RV’S & Motorcycles!!!** Here’s why this is a great idea. People with boats & RV’s usually need LOTS OF OTHER INSURANCE (Home, auto, flood, umbrella etc) in

addition to BOATS AND RV's. So WHO DO YOU know that has a boat, RV, or motorcycle that you could offer an insurance review & our Amazon Gift Card Challenge?

24. **Boat and RV Dealerships...**Another idea here is to stop by boat & RV dealerships to introduce yourself to both the sales & finance managers who could give you a referral when they have a client in a pinch needing insurance.
25. **Alumni Groups.** Again another form of networking. Have strong connections from High School, College, Military etc? Get involved, get engaged with the group & share what you do & how you can be of service to THEM!
26. **Out of State Agents/Contacts-** Who do you know that's in another state that could be a good contact for you? Remember people are more willing to do business than ever before across state, county, & even country lines so if you have good connections in OTHER states let me know as we are licensed in several other states & looking to get licensed in several others. Email [info@GetStrategicIns.com](mailto:info@GetStrategicIns.com) on this.
27. **Trade Shows & Conventions.** You don't need to spend a ton of \$ to host a booth at a trade show (although that could be an option), but you could go as a guest. Boat Shows, Home Improvement Shows etc. can all be great places to show up, engage with other people there as well as the vendors to discuss what you do & how it can benefit them.
28. **Complete a Memory Jogger.** This is a form that helps you think of people like that you may BE forgetting like who on your Christmas card list that you don't talk to often? Who has a great smile? Has kids in college? Who is your car mechanic? Chiropractor, Jeweler, Baker, Candlestick maker? You get the idea. Etc etc. [Click here for form.](#)
29. **Small business owners you know?** Small business owners are GREAT contacts. Why? They need LOTS of insurance all over the place. (Trust me, I am a small business owner & spend a small fortune on all kinds of insurance!). IF you are only Personal Lines licensed you can still ask the small business owner about their PERSONAL INSURANCE & of course, offer to have one of our commercial team members assist with their commercial insurance.
30. **Use video email in your marketing.** You can create personalized videos for your clients & doing proposals with clients for free via loom. Check out [www.loom.com](http://www.loom.com).
31. **Check out PennyApp.com to network with your social media contacts.** This free app can help you get going on your social media. EVERYONE wants to use social media to get business, right? And some do it better than others. The reality is MOST do not have a PLAN or a SYSTEM to leverage their EXISTING contacts. PennyApp.com is FREE and has apps for iPhone and Android as well as a desktop version. It simply allows you to go thru your contacts on social media (like Facebook, Instagram etc) in a systematic way with built in reminders and call to actions. Try it and start connecting with more of your existing network.

**32. Agent of Record.** My favorite 3 letters in the business are AOR! This means everything stays the same with the client, the insurance company BUT YOU become the agent...and get paid on it.

**\*(Parts of this excerpted from insurancesplash.com)**

**\*\*Note for bonus to apply they have to be full proposals in EZ Lynx with all info input for auto insurance & all carriers run. IF policy not written proof of suspense for future quoting has to be in system. For homeowner's insurance wind mitigation/4-point inspections need to be obtained & in the system (if applicable). Both 50 proposals and 5 policies bound have to be done for the bonus. 30 days will start once you have signed & executed contract, & access to our EZ Lynx system. It is the Advisor's responsibility to track this & send to [info@GetStrategicIns.com](mailto:info@GetStrategicIns.com) at end of 30 days that this was done for payout. The 5 policies have to be bound & paid for by the client.**

**Last updated- 1/18/2021- DJL**