



## 3 Simple Insurance Marketing Ideas for Agents and Brokers

Stay on top of your client's minds by using a customer relationship management (CRM) system, direct mail and social media.

### 1. CRM me ASAP

Wouldn't it be helpful to write a 30-year term life policy and 20 years later, when the client is turning 65, send them a birthday card letting them know you can assist them with their Medicare options? One of the biggest goldmines that agents sit on is their existing block of business. A customer relationship management (CRM) system gives agents and agencies the ability to manage and market to that block of business. Being able to search data and generate reports on actionable information like birthdates, policy types and expiration is invaluable.

I've met many agents over the years who are still living in paper. Converting client data into a workable system that lives in the cloud, not some filing cabinet, is worth every penny. Not to mention for compliance and backup purposes, but that's another blog post. Having an organized CRM system with all your clients at your fingertips could also be a windfall down the road if you ever decide to pass your block along to someone else.

#### Get Started

Many different options exist for CRM systems, a quick search on "Insurance CRM" will reveal most of the major players. Some companies have insurance industry specific offerings that might be easier to setup and integrate.

### 2. Targeted and Personalized Direct Mail

A simple note to an existing client can go a long way. Snail mail should still hold a place in your direct marketing repertoire and when you add some automation to it, prices come down and your campaigns become more profitable. Something as simple as a thank you card once a year for a client's past business can spur a flurry of activity. A great time of the year for mailings is around Thanksgiving so you can show them how thankful you are for them being a client. Don't forget to use a postscript or "P.S." at the end. It's the second most read item in a letter following the opening and a perfect time to support whatever you stated in your message and elicit a response.

### Get started

One tool that I have seen a few agents use that can accomplish this, if your clients are in a customer relationship database, is SendOutCards.com. You can upload your client list and choose for them to automatically receive cards on their birthday, anniversary, policy renewal date, etc. You can submit signature and handwriting samples to make it look like you signed them and include gift cards and other options depending on your budget. This can really be a “set it and forget it” system that keeps touching your client’s week in and week out or yearly depending on your need and message.

## 3. Social Media Marketing

You’re probably already using some social network to communicate with friends and family so why not use it to cultivate relationships with clients and earn more “social referrals”? If you’re an agent who steadily and consistently uses social media marketing, you will find success. Make it easy for a potential customer to check out what others say about your services by visiting your Facebook page and stay in your existing clients’ minds when one of their social connections needs your services. An easy way to accomplish this is by having links to your social pages in the signature of your email and on your stationary system, business card, letterhead, et al. Some clients will seek you out on social networks but most will not. If you want to be impactful with social media you’re going to have to take the first step with your clients, consistently.

### Get started

A good approach for potential clients is to look them up on LinkedIn and connect with them professionally. That will give them your professional background and you’ll be able to learn a little more about theirs. After you have made a sale and earned their trust a good follow-up would be to connect with them on Facebook and then ask them to like your business Facebook page and send any friends and family your way if they think you might be able to assist. Keep in mind, Facebook is more personal than LinkedIn, so it might not be appropriate to connect until after the sale when you have learned more about your client and their family or specific situation.

The agents that are most successful marketing to their clients are the ones who have setup a consistent system. By implementing our action ideas, you will form the foundation of a simple but efficient marketing system that will keep you relevant and valued to your clients.

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