

FOUNDATIONS

SYSTEMS/ TRAINING

Sales Activity Tracking

UC/Phone Reports

Quote Tracking

Customer Care Tracking

FOUNDATIONS

TRAINING

Team Meetings

Four Phases of Employment

Three Phases of Development

FOUNDATIONS

MARKETING

Tier I : In-book

Premium by Household
Auto No Fire
Fire No Auto
BOD Premium Decreases
250/500/100 No PLUP

Term Life
Permanent Life
Home Without a Mortgage
Renters No Life Age 50+
Med Supp Age 65

Life Only Customers
Renters with 1K Deductibles
Key ages customers
(59,62,65,70,72)

Tier II: Direct Marketing

Search Engine Marketing (SEM)

Internet Leads

Direct Connect Leads

Contact Center (optional)

FOUNDATIONS

MARKETING

Tier III : Community Marketing

Branding: Social media, news media, flyers, pens, cars

Passive: COIs, local collaboration

Direct: Quote generation

Doing Good: Emotional connection through a cause
