

YOUR 100K BLUEPRINT





AGENT

YOUR BRAND BUILDING STRATEGIES

**Stand out. Be bold.
Define your promise to the consumer. Deliver.**

An original and memorable brand can help build credibility. It can also help you get in front of new prospects, increase client retention efforts, and generate more referrals. PIMSCO can assist you with brand building materials to help you achieve your \$100K Agent commission status. Your strategy should include:

Logo: Include a graphic mark, emblem or symbol to visually promote your insurance business and build recognition.

Website: It's essential to have a fully optimized, mobile-friendly website with lead-capturing opportunities. Utilize Google Analytics to track and report your website traffic and marketing initiatives.

Manage First Impressions: Get a professional email address. Try not to use a Yahoo or Gmail account. Include your logo and contact information in your email signature.

Identity Package: Invest in professionally designed and printed materials to give to your clients. (Ex: business cards, letterhead, envelopes, pocket folders, note cards, etc)

Company Brochure: Introduce your company and its services through a compelling, custom brochure highlighting your services, team and unique differentiators.

Professional Bio: A professionally written bio with headshot should showcase your professional services, accomplishments, and personal interests. Insert into your one-on-one appointment and seminar packets, share with centers of influence, and use the bio on your website.

Branded Promotional Items: Always have branded items with your logo around that you can give away at your office, appointments, seminars, events, etc. (Ex. Pens, notepads, shirts, etc)

Voicemail Messages: Keep your incoming voicemails updated and market yourself. Include your company name and a brief message.

Agents are responsible for following the state advertising regulations and approval requirements of the carriers they represent and their Broker/Dealer and Registered Investment Advisor, if applicable.



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YOUR LEAD GENERATION STRATEGIES

PIMSCO will help you create a systemized lead generation system that's implemented consistently throughout the year. We're leveraging the best ideas and proven strategies from other top producers around the country to help you meet your insurance production goals.

Preset Appointments: Send preset appointment mailers inviting prospects to a one-on-one appointment. (In home/office, lunch, or dinner) In states permitted, offer gift cards or incentives to generate additional interest. QTY: 1-2 mailers per year

Traditional Dinner Seminars and Table Talks: Host monthly informational large group seminars or small group table talks. To keep the message fresh, we recommend rotating topics. This can include Estate Planning, Retirement Income Planning, Social Security, Medicare, etc. QTY: 4 (7,000 Piece) seminar mailers (2 event dates per mailing). Supplement mailings with digital or Facebook ads.

Search Engine Marketing (Paid Search): Generate online leads from consumers searching for specific keywords in your area: (retirement, social security, medicare, etc). Your text ad will appear at the top of the search and can be clicked take them to your website. QTY: \$300 monthly budget

Revisit Past Opportunities: Go back 2-3 years and reach out to those prospects who said "no" the first time around. Situations change, an opportunity might present itself, or maybe they know someone who will benefit from your services.

Mentor an Intern: Build a kit that includes information on your business. Target a small list of businesses in your area and hire an intern (local college is a good source) to visit those businesses to get contact information, a business card, and provide your kit as a leave behind.

Existing Clients and Referrals: We anticipate that a portion of your business (approx. 10-15%) will come from referrals and new business from existing clients.

Various state insurance regulations, as well as other state regulators prohibit the "gifting" of items, or inducements, which may include entertainment expenses, marketing or other activities by financial professionals in excess of a certain dollar value with some of those limits being as low as an annual aggregate value of zero dollars.

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YOUR LEAD GENERATION STRATEGIES

Client Communication/Events

Running a successful business is all about creating and sustaining meaningful relationships. PIMSCO can help you build systems to deepen your client relationships through relevant communications, memorable events, and out-of-the-blue WOW experiences.

Purchase and Implement a CRM Service: This will help organize client information, contact history, and services provided to help when clients have questions about their coverage or have important milestones approaching. (Ex. birthday, anniversary, etc)

Mini Referral & Educational Events: Host quarterly events. (Ex. TableTalk, Wine Tastings, Bowling, lunch & learn, etc)

Send Something Unique: Find unique interests of your client and send token gifts (Ex. souvenirs, online or newspaper article clips, etc) reflecting what you remember and send it to your client with a message like “Thought you would like this”.

Personal Phone Calls: Calling clients to celebrate a birthday or anniversary goes a long way toward building a lasting relationship. Organize a monthly birthday & anniversary list and either contact clients personally or hire an intern to help out.

Develop a client Newsletter Service: Distribute a monthly article to your clients discussing the benefits of insurance products and retirement strategies. The articles should also be integrated to your website and LinkedIn/Social Media accounts.

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YOUR BUSINESS BUILDING STRATEGIES

Producer Training

PIMSCO gives you the opportunity to receive ongoing business building and insurance sales training with day one full access to all of our sales platforms. Not to mention you'll receive one-on-one coaching with our skilled sales and marketing team

- ✓ Attend carrier training webinars and conferences.
- ✓ Attend In-House PIMSCO Elite Sales Training Events.
- ✓ Schedule a tutorial for PIMSCO's Annuity-Care Sales Platform.
- ✓ Master the following sales ideas with your sales coach:
 1. *Lazy Money Concept*
 2. *Cost of Liquidity Concept*
 3. *Sequence Risk Concept*
 4. *Life Policy Platform*
 5. *Annuity X-RAY Platform*

Some training opportunities may require an active securities registration with a Broker/Dealer or Registered Investment Advisor to implement.

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YOUR BUSINESS BUILDING STRATEGIES

Practice Management

Office efficiencies and systems can lead to more productivity. Increase positive perceptions when you run a well-organized, professional office.

CRM Service: Track your leads and client interaction with a customer relationship management (CRM) or database system.

Client Classifications: Separate clients into ideal A, B, C, and D categories. Ideal clients get special “above and beyond” birthday/holiday gifts.*

Ideal Week: Create a time management schedule that allows you to dedicate your week to three main areas: working in your business (prepping for and meeting with clients), working on your business (practice management and prospecting/marketing and networking), and time off/not working (time to clear your mind).

Client Reviews: Offer clients opportunities for annual reviews to determine if they are on track to meet their insurance and financial goals.

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