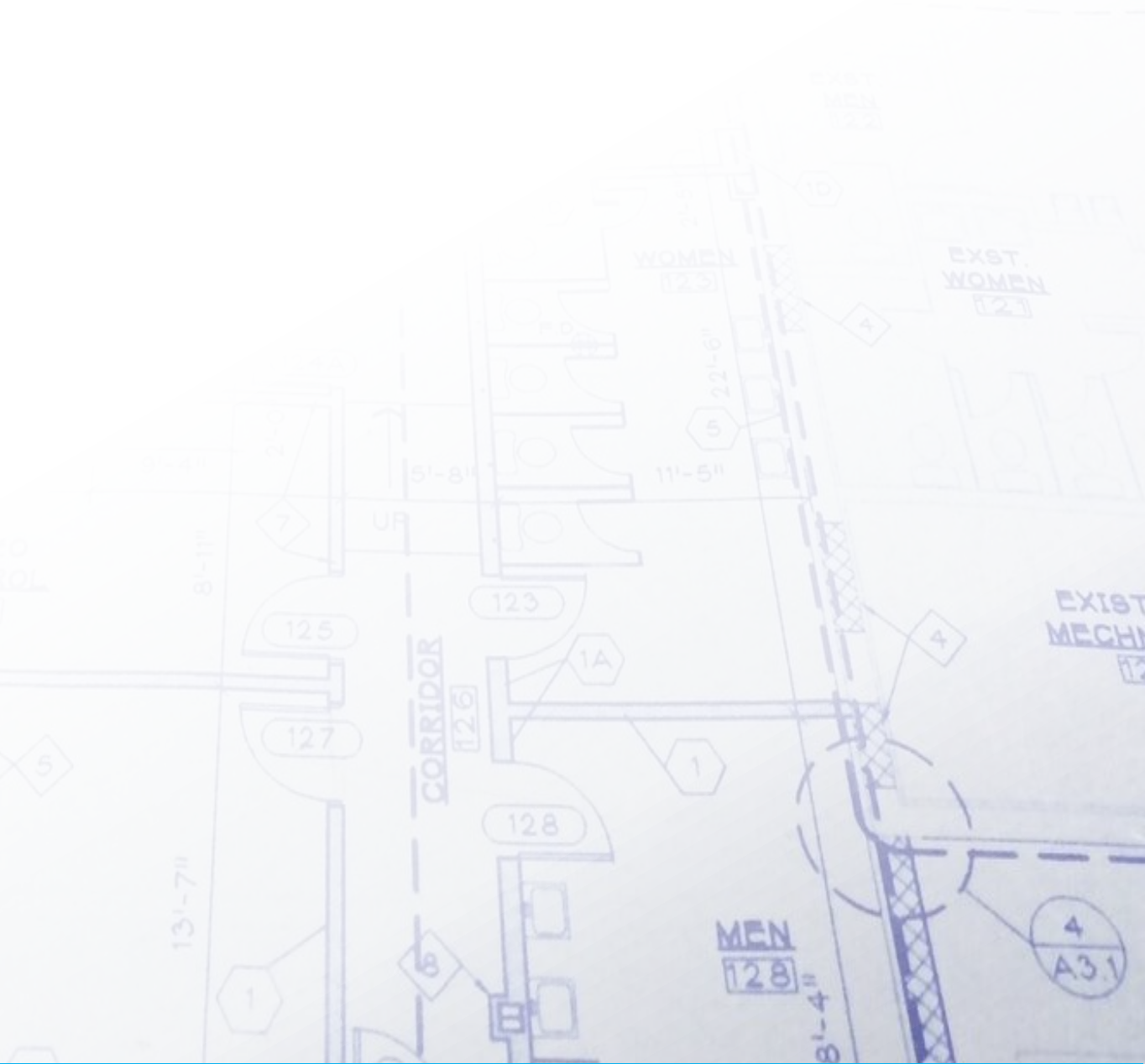


# YOUR 500K BLUEPRINT





PRESIDENT

## 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 \$500K Presidential commission status. Your strategy should include:

**Website:** Take the time to consider website enhancements. (Ex. other insurance services and financial designations, etc)

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

**Professional Bio:** Continue updating your bio to 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)

**On-Hold Messaging:** Deliver important information about services to callers waiting on hold or while they're being transferred. Update messages quarterly.

**Local Sponsorships:** Put your business in the spotlight by helping to sponsor local organizations that interest you. This could include sponsorship of golf tournaments, 5k runs, business breakfasts, galas, student sporting events, etc. Your brand will get noticed on banners, t-shirts, jerseys, event/sports programs, gift bags, football schedules, etc.

**Digital/Social Media:** Gain market share in the online marketplace. Leverage digital and social media ads (Facebook, LinkedIn) to engage customers, deliver targeted messages and increase the number of encounters with your brand.

**First Impressions Video Booklet:** Display your first impressions video in a compelling and memorable way with custom booklets you can send to referrals and centers of influence.

**TV Commercial:**

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.

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**Preset Appointments:** Increase your marketing budget to send out more mailers. In states permitted, offer gift cards or incentives to generate additional interest. QTY: 10-15 mailers per year

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**Traditional Dinner Seminars and Table Talks:** Consider incorporating additional mailers. QTY: 10 (7,000 Piece) seminar mailers annually (2 event dates per mailing). Continue supplementing mailings with digital or Facebook ads.

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**Search Engine Marketing (Paid Search):** Increase your budget to continue generating online leads from consumers searching for specific keywords in your area. QTY: \$750 monthly budget.

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**Search Engine Optimization:** Utilize SEO to increase inbound website traffic by helping you rank higher on search engines like Google and Bing. QTY: \$1,000 monthly budget.

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**Digital/Social Media:** Increase your budget to continue creating digital and social media ads. QTY: \$750 monthly budget.

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**Radio Show:** Continue expanding your lead generation opportunities and be featured as a thought-leader in your local market by hosting a weekly radio show. Use this strategy to cross promote other events such as seminars or table talks. QTY: Weekly 30 – 60 minute show.

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**Revisit Past Opportunities:** Continue reaching out to current clients as well as 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.

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**Existing Clients and Referrals:** We anticipate that a portion of your business (approx. 30-40%) will come from referrals and new business from existing clients.

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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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PRESIDENT

# 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.

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**Client Appreciation Events:** Host one major event annually. (Ex. Wine tasting, boat cruises, chefs tables, golf tournament, driving experience, charity events, etc)

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

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**Referral Program:** Continue working with your sales coach to learn how to incorporate a systematic referral program at the close of your appointments. Also consider creating a VIP Ambassador Program. Host unrivaled special events for VIP members and show them the extra TLC with birthday, holiday, or “just because” gifts/cards.\*

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**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.

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**Blog/Podcasts:** Incorporate blog posts and podcasts into your website. Promote the content via social media and email marketing.

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**Develop a Client Newsletter Service:** Distributing a monthly article to your clients discussing the benefits of insurance products and retirement strategies. Consider sending information about additional services that you offer. These articles should also be integrated to your website and LinkedIn/Social Media accounts.

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PRESIDENT

# 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.
- ✓ Acquire additional financial designations such as CFP, CLU, ChFC, etc.
- ✓ Attend In-House PIMSCO Elite Sales Training Events.
- ✓ Continue learning how to sell additional lines of insurance with your sales coach.
- ✓ Work with your sales coach to learn how to acquire additional assets under management.
- ✓ 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.

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**Office Space:** Continue upgrading your office location with new financial designations, production rewards, etc.

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

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**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).

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**Sub-Producers:** Consider adding sub-producers to your down-line for increased profits.

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**Staff Members:** Consider adding staff members to assist you and your sales team with seminar/table talk scheduling, contracting, case design, new business, commissions, etc.

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**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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**Professional Advisory Board:** Find 4 or 5 professionals in your area – build a strong relationship. Consider CPA’s, accountants, physicians, etc. Meet weekly or bi weekly. Discuss all aspects of your business including: type of clients who you help, prospecting method, success/failures, office space, staff, etc. Get introductions to their clients and offer to provide introductions to yours.

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**Client Advisory Board:** Organize 5-10 of your most respected, trusted clients to create a sounding board for your business. Tap into their expertise and business acumen to provide you with guidance, support and feedback on new marketing, client service and business initiatives.

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