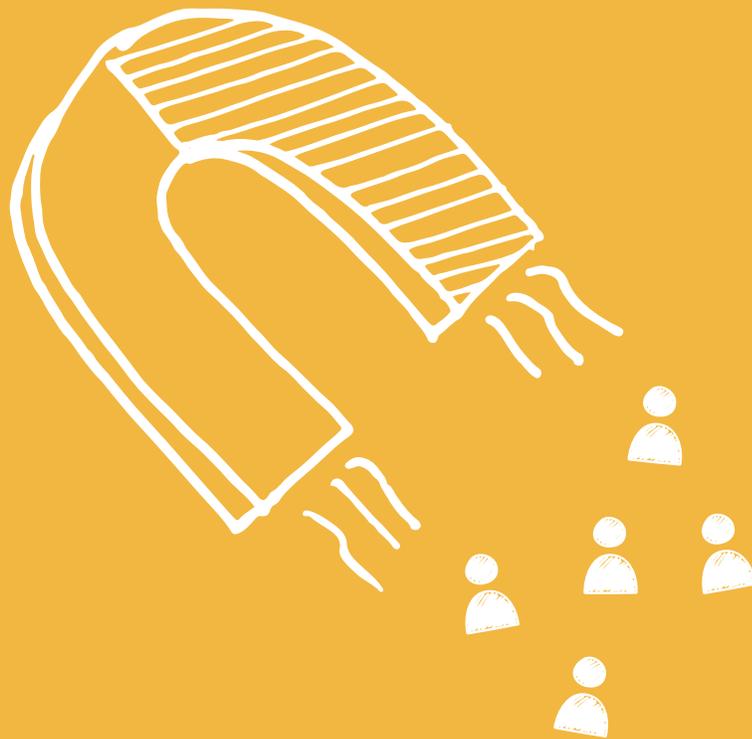
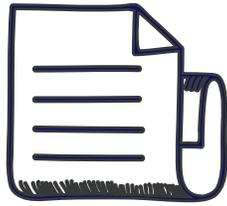


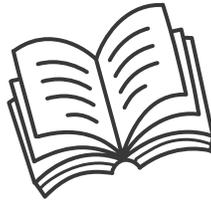
# INBOUND MARKETING FOR INSURANCE AGENCIES





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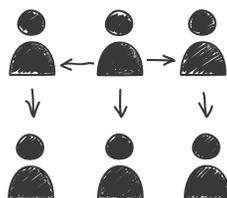
# INTRODUCTION

Whether you're an agency owner, sales manager or producer, you're likely always on the lookout for new sales and marketing tactics to grow your business. In this resource, we're going to highlight a very specific type of marketing, known as inbound marketing.

Inbound marketing focuses on using marketing to attract customers to you, rather than "interruption" type methods such as cold calling and advertising. The way that you attract those prospective customers is with compelling content that speaks to their needs or challenges. Using this valuable content, you can create campaigns tailored to specific prospects, helping you emotionally connect with them from the start. The best part about this type of marketing is that it allows prospects to let you know when they are interested, generating the most qualified leads.

Though it may not be familiar to you, inbound marketing is actually quite effective for insurance agencies like yours. That is because every employer you pitch already has a broker—and many of them aren't looking to switch when you contact them. Instead of cold calling and trying to convince them to fire their broker, inbound marketing allows you to make a case through compelling content. Then prospects can "raise their hand" when they are interested and ready to talk. This produces highly qualified leads for your agency, shortening your sales cycle and increasing your close rate.

In this ebook, we're going to discuss how to implement inbound marketing at your agency in just three steps.



# CHAPTER 1

## STEP 1: BUILD BUYER PERSONAS

An essential part of inbound marketing is tailoring your message to your prospect. You don't want to rely on a "one-size-fits-all" approach. Rather, the goal is to deeply understand the needs and challenges of your various buyers, and develop content and campaigns that speak to each one.

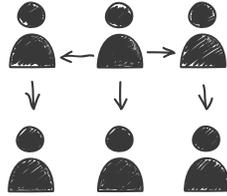
### WHAT IS A BUYER PERSONA?

Because it isn't feasible to send individual campaigns to every single prospect, we use buyer personas to generalize characteristics of the main "buyers" you encounter (such as HR, CFO, owner, etc.).

A buyer persona is a semi-fictional representation of your ideal customer based on market research and real data about your existing customers. When creating your buyer persona(s), consider including customer demographics, behavior patterns, motivations and goals.

Source: HubSpot

Essentially, you create a persona for each of your primary buyers. Understanding the demographics and motivations of that persona helps you market more effectively to them.



# CHAPTER 1, CONT.

## STEP 1: BUILD BUYER PERSONAS

### HOW TO CREATE BUYER PERSONAS

A buyer persona exercise is best conducted with a diverse group of people from your agency, including management, producers and account managers.

There are countless buyer persona templates available online, but the most important thing to remember is that you want to include both demographics and motivations, and try to be as detailed as possible. Here are just a few of the questions you'll want to answer when building your persona:

- What is the age, gender, education level and other demographic information of this persona?
- What does this person value?
- What keeps them up at night?
- What challenges do they encounter in their day-to-day job?

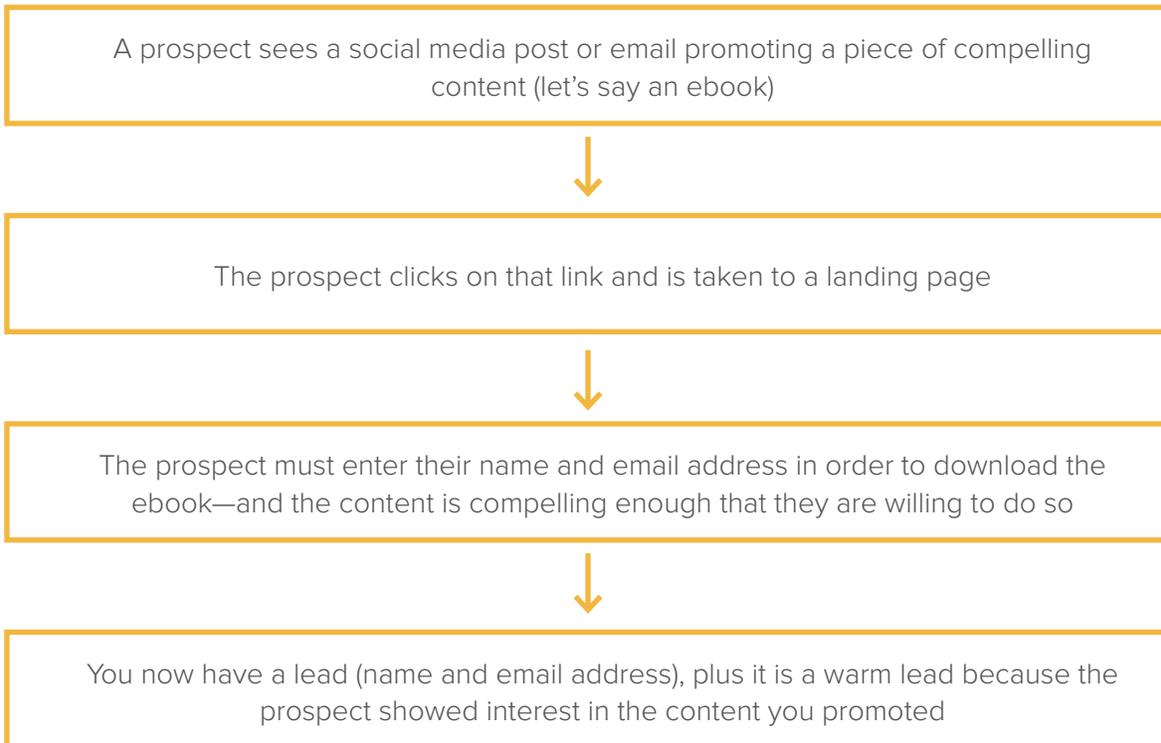
Once you are finished creating buyer personas, make sure they don't get hidden away in a file that no one sees. Everyone in your agency should be well-versed on these personas, so that you all have common language to talk about your main buyers. This benefits strategic sales and marketing conversations, as well as the next steps of the inbound process (discussed in upcoming chapters).



# CHAPTER 2

## STEP 2: CREATE COMPELLING CONTENT

Content is the foundation of inbound marketing. The goal is to create content that is beneficial and valuable to your prospects—educational, rather than sales-oriented in nature. Here’s how content drives the inbound marketing approach:





# CHAPTER 2, CONT.

## STEP 2: CREATE COMPELLING CONTENT

### HOW TO CREATE COMPELLING CONTENT

To get started with this step, brainstorm a list of content for each of your personas. Ideally, your content should speak to pain points, needs or challenges of that buyer, so that they are interested in downloading it. Some content ideas might include:

- Annual compliance checklist (for HR)
- How to manage rising healthcare costs (for CFO, owner)
- Will your health plan attract and retain top talent? (for HR, owner)

When brainstorming content, keep in mind that there are countless types of content you can create, including:

- Ebooks
- Whitepapers
- Blogs
- Checklists
- Infographics
- Guides
- Timelines
- And much more

Start slow. Once you have a list brainstormed, perhaps commit to creating one new content item per month, and each month rotate which persona you are creating content for. Then you can run a campaign the following month using your new content piece. Over time, you will build up a great library of content for your team to use, but understand it won't happen overnight. It takes some time to produce great, compelling content.



# CHAPTER 3

## STEP 3: DEVELOP TARGETED CAMPAIGNS

Once you have your buyer personas built and content created for each persona, it's time to start the actual marketing. There are many ways to deliver your content, but here we will just focus on a few: email, social media and digital advertising.

### FOR PROSPECTS YOU HAVE EMAIL ADDRESSES FOR

Email campaigns can be extremely effective, assuming you have a list of email addresses to start with. If so, follow these recommendations to get started on your email campaigns.

- If possible, segment your list by persona, so you can send targeted campaigns to one specific buyer
- Send a mixture of content, including content they can access for “free” and content they must share information to download
- Even though you have the prospect's email address, there is still value in having them fill out a form to download content
  - First, it shows that they are interested, and can signal a warm lead to pursue
  - Second, you can use the download forms to collect more beneficial information about the prospect. For instance, if you don't know the prospect's role (HR, CFO, etc.) you could ask that as a form question in lieu of other information



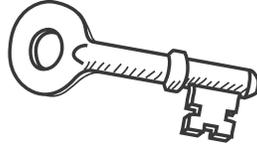
# CHAPTER 3, CONT.

## STEP 3: DEVELOP TARGETED CAMPAIGNS

### FOR PROSPECTS YOU HAVE DON'T EMAIL ADDRESSES FOR

When you don't have a large email list of prospects, inbound marketing can help you build that lead list while also identifying leads that are warm to pursue now. For this approach, social media and digital advertising generally work well. You can promote your content either on your social media channels or through a digital marketing campaign, and when people click on the link, they will be required to enter an email address to download. Here are a few tips:

- Target as much as possible. Many digital advertising platforms have sophisticated targeting mechanisms, allowing you to target viewers by location, age, interest and other demographics. Using your own social media platforms doesn't allow you as much targeting capability, but you can do so in your posts. For instance, if posting content specific to HR, you could write in your post: "HR Managers: Have you ever struggled with this problem..." That will call attention to your intended audience and increase the likelihood of getting the leads you're looking for
- Consider include a spot for "role" on your forms. Since these are new leads, you won't know who they are, and asking about their role up-front helps you build an email list that is easy to segment and target later



# CONCLUSION

Inbound marketing can be incredibly effective when executed well, and is a great fit for employee benefits insurance agencies. Rather than bombarding prospects who aren't looking for a new broker, inbound marketing allows the agency to slowly educate and build rapport with the prospect, so they can signal when they are interested. Using this approach can produce more qualified leads for the producer, shorten the sales cycle and increase close ratio.

Getting started with inbound marketing can be as easy as following the three steps outlined in this ebook:

- Build buyer personas for your main “buyers” (e.g., HR, CFO, owner)
- Create compelling content that addresses the pain points and needs of each of those buyers
- Design and send targeted campaigns using that content, to collect warm leads