



# Agent MARKETING

[www.chcquotes.com](http://www.chcquotes.com)



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# *Welcome*

Marketing is fundamental for individuals and organizations of all sizes and across all industries, as it enables them to attract and retain customers, generate revenue, and achieve their broader business objectives.

Through strategic marketing efforts, businesses can build brand awareness, enhance their reputation, expand their market presence, strengthen customer engagement, and ultimately drive sustainable growth and improved sales performance.



# *Marketing 101*

## UNDERSTANDING MARKETING

### **What is Marketing?**

Marketing is the process of promoting, selling, and distributing products or services to attract and retain customers. It involves understanding customer needs and desires, having products that satisfy those needs, and creating promotional campaigns to raise awareness and interest. The end goal is to effectively communicate the value of the product or service to potential customers and ultimately drive sales and create long-lasting customer relationships.

### **The Importance of Marketing**

- Establishing Credibility
- Building Trust
- Staying Consistent

### **Understanding What to Expect**

Starting your marketing journey as a health insurance agent can be both exciting and challenging. It requires time, effort, and persistence, but with a well-planned strategy and consistent execution, you can attract and retain clients and grow your business over time.

# Understanding Where to Start

## BREAKING DOWN MARKETING

### Let's Get Established



Create an individual online presence. Social media is a great, free way to promote yourself and display your brand.



Create business profiles on social media. The business account makes sure that you can track analytics. This will help you see an increase in interaction with accounts and track how your posts are doing.



Create a personal website where people can go to understand more about you and start their insurance journey with you as their agent.

**To request an agent affiliate site:** Email Mari Krivelow at [marketing@chcquotes.com](mailto:marketing@chcquotes.com).

In the Subject line Put "Request for agent website first name/last name"

\$15 a month payable with card or marketing money (Top Broker balance)

# *What CHC Offers*

**WE ARE HERE TO HELP**

## **Highlights of What is Offered**

- CHC Affiliate Sites
- Business Cards
- Flyer Templates
- Trifold Creation Help
- Marketing Trainings
- Newsletter Agent Highlights
- 5 Star Reviews
- Top Broker CRM
- SalesGod CRM
- Social Media Help
- MORE!

Visit [www.chcagents.com](http://www.chcagents.com), navigate to the resources tab and click “marketing” for more information!

# *Social Media*

## **BREAKING DOWN YOUR PLATFORM**

### **Social Media Platforms**

The best places to start your personal branding are on:

- Instagram
- Facebook
- LinkedIn

Each of these platforms have an option for a business page. To get them, go to your app store and download the apps. From there, follow the onscreen instructions to create your account.

### **CHC Social Media**

You can repost **ANYTHING** that CHC posts on our socials (Instagram, Facebook, LinkedIn, X(Twitter), & TikTok.)

### **What Kind of Content Do I Post?**

The amazing thing about social media is that there is no right or wrong answer! Marketing is all about trial and error, seeing which posts get the most interaction and learning as you go. Examples of types of posts include educational posts to explain about insurance or yourself, client testimonials, how-to guides, why to buy, Q&A, photos of you and so many more! Stay informed on social media for current trends, content, news, and tips. Check out the CHC Instagram page for examples.

By consistently creating and sharing valuable content that educates and engages your target audience, you can establish yourself as a knowledgeable and trustworthy insurance agent and attract more clients to your business.

# CREATE A PLAN

GOAL

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ACTION PLAN

DATE

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NOTES

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Want to chat? Complete this form  
and email it to  
[marketing@chcquotes.com](mailto:marketing@chcquotes.com) and we  
will find a time to work together.

\*\*contact information on last page

# *Utilizing Your Resources*

1: INTRODUCING YOURSELF

2: YOUR AFFILIATE SITE  
&  
BUSINESS CARDS

3: SERVICES OFFERED

4: NEXT STEPS

5: MARKETING AIDS



# *Introducing Yourself*

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**Introduce yourself to your audience. Let them get to know you so they can feel a sense of comfort and trust towards you.**



Start with a picture of you! It can be fun, but keep it professional. Make sure only you are in the picture so people can identify who you are.

**First & Last Name**

*Title*

✉ Email

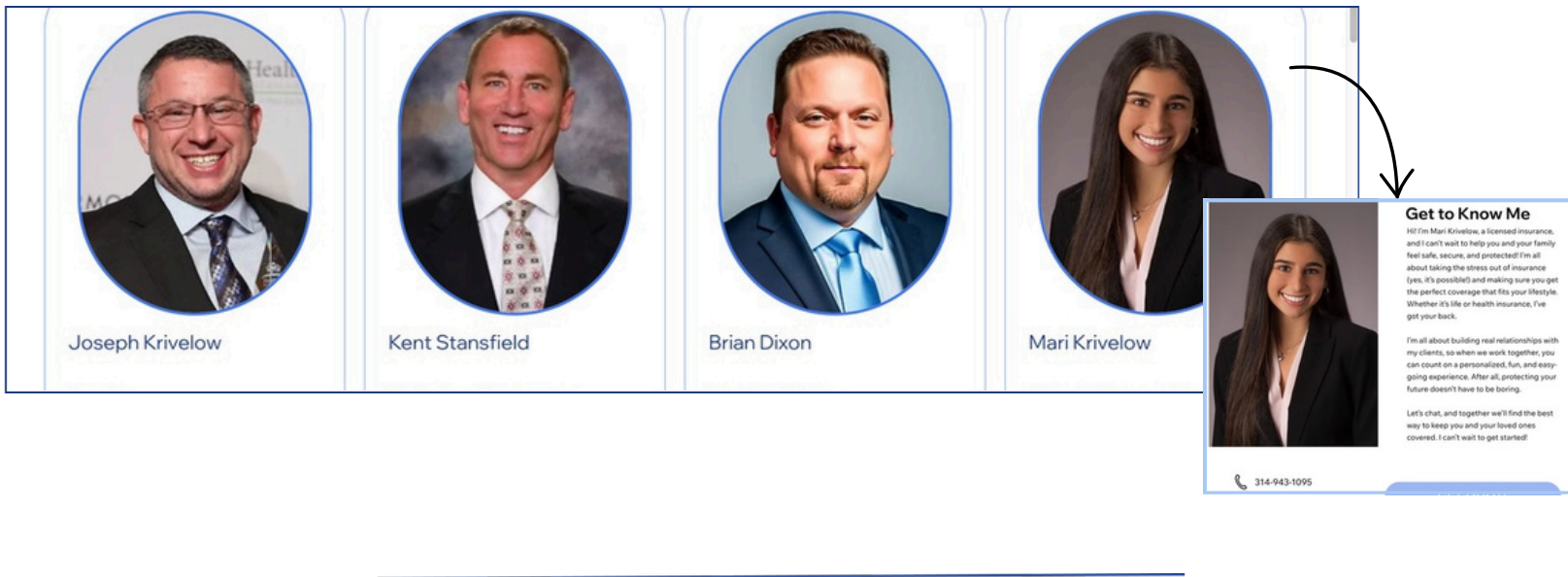
☎ Phone Number

Keep your info simple and direct. People can contact you easier and faster.

# Affiliate Site

This is a webpage just for YOU! It includes a customizable form that you can automate with TopBroker, rating form, has a “Sort by State” feature, and MORE!

Visit [www.chcbrokers.com](http://www.chcbrokers.com) to get a look at others that currently have pages with us. This is a great source of credibility and lead collection and is ONLY \$15/mo payable with TopBroker balance or credit card.



The screenshot displays a row of four agent profiles, each with a circular headshot and a name label below it. From left to right, the agents are Joseph Krivelow, Kent Stansfield, Brian Dixon, and Mari Krivelow. A callout box on the right side of the row is expanded, showing a larger headshot of Mari Krivelow and a 'Get to Know Me' bio. The bio text reads: 'Hi! I'm Mari Krivelow, a licensed insurance, and I can't wait to help you and your family feel safe, secure, and protected! I'm all about taking the stress out of insurance (yes, it's possible!) and making sure you get the perfect coverage that fits your lifestyle. Whether it's life or health insurance, I've got your back. I'm all about building real relationships with my clients, so when we work together, you can count on a personalized, fun, and easy-going experience. After all, protecting your future doesn't have to be boring. Let's chat, and together we'll find the best way to keep you and your loved ones covered. I can't wait to get started!' Below the bio is a phone icon and the number 314-943-1095.



## CHC Business Cards

Visit <https://chc.hotprints.com/> and click “register” on the bottom



# *Services Offered*

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Market the different types of insurance that you offer your clients. Whether that is life, group, dental, or other. Demonstrate that CHC offers plans specifically for each person, group, and business. We value their needs and give the best plans specialized for them.

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# *Next Steps*

Provide your contact information so it's readily available for all clients to contact you. Create a personal website, and personal socials, and display your brand on those platforms.



[www.chcquotes.com](http://www.chcquotes.com)

[www.chcbrokers.com/yourname](http://www.chcbrokers.com/yourname)

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# *Marketing Aids*

Method Description	
Scheduling	Create posts and then schedule them to be posted on each of the social platforms for ease.
Canva	Use templates to create videos, graphics, presentations, and more.
Chat GPT	This AI helps create captions, blogs, posts, and more.
Calendly	Scheduling tool that simplifies the process of booking appointments and meetings by allowing users to share their availability and automate the scheduling process.

## Notes

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### FOLLOW US :

**Instagram**  
@compasshealthconsultants\_

**Facebook & LinkedIn**  
Compass Health Consultants

**TikTok**  
@Compass.health.co

# Branding Kit

## COMPASS HEALTH CONSULTANTS®

### DOWNLOAD LOGOS



If you are looking for a Vector format of the CHC logo, please click [here](#)



### COLOR PALETTE



#f4f6fc



#a7c8f8



#4278e7



#1e4599



#050a30

### FONTS

HEADER

**Aa** Montserrat Bold

BODY

Aa Montserrat

### TO NE

- Professional
- Positive
- Clear & Simple
- Consistent

## Compass Health Consultants®

When using the name Compass Health Consultants®, please include the trademark ®. To learn how to do that, please search your type of computer and key board shortcut. For example: "Windows trademark R shortcut".



### What's in the kit?

- Downloadable Logo & Caleb the Compass
- CHC colors, font, and tone
- How and when to use the trademark ®
- Downloadable photos for your email signatures & social media

### Where can I find the kit?

- To find the kit, please go to
  - ▶ [chcagents.com](http://chcagents.com)
  - ▶ Resources
  - ▶ Marketing
  - ▶ CHC Brand Kit

If you are looking for a Vector format of the CHC logo, please click [here](#)

Need help or have questions? Email [marketing@chcquotes.com](mailto:marketing@chcquotes.com)

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# *Marketing Plan*

## Method Description

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Instagram	Use stories, highlights, and video reels, and create a business account to see analytics. More casual feel, posting everyday images, reposting other posts, and more.
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Facebook	Use stories, highlights, and video reels, and create a business account to see analytics. More casual feel, posting everyday images, reposting other posts, and more.
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Linkedin	A more professional feel, business updates, and informational graphics.
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Website	Use CHC's Affiliate Website to create a personal website, displaying all you have to offer potential clients.
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Emails	Create an individualized email signature to help you stand out.
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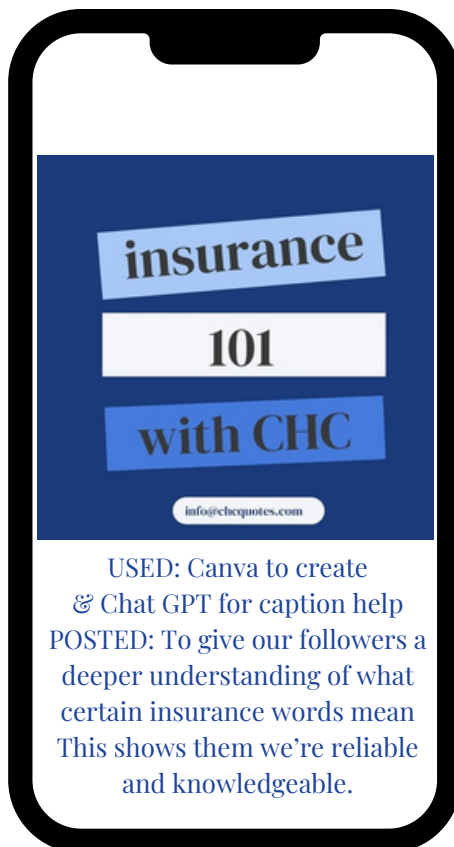
# Marketing Plan

If you don't want to post your own content, you can pay a company to do it for you.

If you don't know where to start for creating content, look at our socials for ideas on what to post.

Utilize highlights, reels, stories, feed & more!

EXAMPLE 1



EXAMPLE 2





**MARI KRIVELOW**  
Marketing Manager



**LIZZY BENNE**  
Marketing Specialist

## **HAVE MORE QUESTIONS?**

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Don't hesitate to reach out!



636-561-5739 ext. 10



[marketing@chcquotes.com](mailto:marketing@chcquotes.com)



<https://calendly.com/mkrivelow>

