

AGENT MARKETING TOOL KIT



www.chcquotes.com





Marketing is essential for people and businesses of all sizes and industries as it helps them attract and retain customers, drive sales and revenue, and ultimately achieve their business objectives.

By using marketing techniques you're creating awareness towards your customer base, building brand image and reputation, expanding your market reach, creating more customer engagement, and driving sales and revenue.

WELCOME

Marketing 101

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.

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.

WHAT SHOULD I 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.

Marketing 101

WHERE DO I START?



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 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 site: Email Mari Krivelow at 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 (TopBroker balance)

AFFILIATE SITE INFORMATION

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 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.

Let's begin...

Highlights



WHAT'S THE MOST IMPORTANT?

1. Establishing Credibility
2. Building Trust
3. Staying Consistent

WHAT DOES CHC OFFER?

- Affiliate Sites
- Business Cards
- Flyer Templates
- Trifold Creation Help
- Newsletter Agent Highlights
- 5 Star Reviews
- TopBroker CRM
- SalesGod CRM
- Social Media Help
- MORE!

Visit www.chcagents.com, navigate to the resources tab and click “marketing” for more information!

SOCIAL MEDIA

You can repost ANYTHING that CHC posts on our socials (Instagram, Facebook, and LinkedIn), you can book 1-on-1 meetings with Mari Krivelow, Marketing Manager, for more help learning, setting-up, or utilizing tools like scheduling, Canva, AI, and more.

CREATE A PLAN

GOAL

ACTION PLAN

DATE

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NOTES

Want to chat? Complete this form
and email it to me and then add a
time on my calendly!

**contact information on last page



INTRODUCE YOURSELF



First & Last Name

Title

✉ Email

☎ Phone Number

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

CHC BUSINESS CARDS

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



SERVICES OFFERED

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.

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.

Thank you!



www.chcquotes.com

www.chcbrokers.com/yourname

Marketing Plan

Method	Description
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.
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.
Linkedin	A more professional feel, business updates, and informational graphics.
Website	Use CHC's Affiliate Website to create a personal website, displaying all you have to offer potential clients.
Emails	Create an individualized email signature to help you stand out.

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



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

FOLLOW US :



@compasshealthconsultants_



Compass Health Consultants



HAVE MORE QUESTIONS?

Don't hesitate to reach out!



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<https://calendly.com/mkrivelow>

MARI KRIVELOW

MARKETING MANAGER