



MARKETING ACTION CHECKLIST

Platform	Required Items	Status	Handle
Facebook	Headshot, Bio, Pinned "Career Update" post		
Instagram	Headshot, Bio, Pinned "Career Update" post		
LinkedIn- more professional tone, posting etc	Headshot, Extended Bio, Pinned "Career Update" post		

WHAT TO PUT IN YOUR BIO

Who you are, what you do, who you serve, how to reach you - email, calendly link, phone number

OPTIMIZE WITH AI

Here are the optimized prompts you can paste into any AI LLM (Claude, ChatGPT, etc.):

FACEBOOK PERSONAL BIO

Write a Facebook personal profile bio for a health and life insurance agent.

Name: First Last

Brand: Insert

Location: [City, State]

Keep it under 255 characters.

Tone: friendly and approachable.

Highlight that I'm independent, offer free consultations, and help individuals and families find the right coverage. No jargon.

FACEBOOK BUSINESS PAGE

Write two things for my Facebook Business Page:

1. A short description (max 255 characters)

2. An extended About section (2-3 short paragraphs)

Business: Just Ask The Insurance Guy

Owner: Rich Sterling, independent health and life insurance agent

Location: [City, State] | Licensed in: [States]

Services: individual/family health, Medicare, life insurance, small business group benefits

Tone: trustworthy, no-pressure, plain-spoken. Emphasize I shop multiple carriers and work for the client, not the insurance companies.

LINKEDIN ABOUT SECTION

Write a LinkedIn About section for an independent health and life insurance agent.

Name: Rich Sterling

Brand: Just Ask The Insurance Guy

Years of experience: [X]

Licensed in: [States]

Specialties: ACA/marketplace plans, Medicare Advantage and Supplement, private coverage, term and whole life, final expense, small business group health benefits.

Tone: professional but warm. Lead with who I help and what problem I solve.

Include a short bulleted list of specialties. End with a soft call to action.

Target length: 800-1,200 characters. No clichés like "passionate" or "guru."

INSTAGRAM BIO

Write an Instagram bio for a health and life insurance agent.

Name: Rich Sterling

Website: justasktheinsuranceguy.info

Hard limit: 150 characters total (including spaces and line breaks).

Format it across 3-4 short lines.

Include: what I do, that I'm independent, and a nudge to visit the link.

No filler words. Make every character count.

Each prompt is self-contained — just fill in your location, states, and years of experience before running.

REQUIRED TOOLS & SITES

SET UP THESE ESSENTIAL TOOLS TO STREAMLINE YOUR WORKFLOW AND LOOK PROFESSIONAL!

Tool/Site	Purpose	Contact/Login/Bookmark	Setup Status
Calendly.com	Appointment scheduling		
crankwheel.com	Screen sharing Tool		
chcbrokers.com	Marketing page through Compass (\$15/mo)		
CHC Agents Email	Professional email communication		

CONTENT CALENDAR - EXAMPLES

CONSISTENCY IS KEY! USE THIS CALENDAR TO PLAN ENGAGING CONTENT THAT BUILDS TRUST AND ATTRACTS CLIENTS.

Content Topic	Type	Call to Action	Posted
What is a deductible?	Educational	"Drop deductible and I'll reach out to you"	
Why are you in the industry?	Personal Story	"Drop Story and I'll DM you"	
What is the max out of pocket?	Educational	"Drop MOOP and I'll message you today!"	
Impactful client success story	Case Study	"Drop client and I'll be in touch"	
Why do I even need health insurance?	Educational	"Drop health and I'll reach out"	
Healthy tip of the day	Wellness	"Drop healthy and I'll reach out to you"	
Why do I need life insurance?	Educational	"Drop Help and I'll get you on the right path"	

**PRO TIP FOR
MAXIMUM
ENGAGEMENT:**

Post Reels & Slides with captions, share to your stories, and always include a clear call to action!



REFERRAL PARTNERS

REACH OUT TO AT LEAST 10 OF EACH

Build your network! Reach out to at least 10 professionals in each category to create a powerful referral system.

Partner Type:	Update:
Realtor	
P&C agent	
Financial Planner/wealth manager	
Divorce Attorney	
Mortgage Broker	
CPA	
Weekly Networking Event	

PRO TIP:

Send 40 messages per social media platform daily

5-STEP CONNECTION STRATEGY

1. Send connection request- reach out to start building a genuine professional relationship.

2. Send personalized message- introduce yourself with a friendly note.

"Hi ____, I'm looking to collaborate with like minded individuals to help each other grow our businesses. I would love to connect this week to see if there is an opportunity to help each other out. Are you open to a conversation?:"

3. Schedule the meeting- connect by phone call, Zoom, or in-person coffee.

4. Set clear expectations- discuss the best way to exchange referrals and support each other.

5. Stay in contact monthly- cross-post and tag your referral partners on stories and social media

Your Referral Sweet Spot:

- The best way to send me a referral is a group text or an introduction email.
- My ideal client is anyone under 65 needing medical, dental, vision, life, or supplemental
- Our Sweet Spot is helping self-employed, business owners, and 1099's. Whether they are solo, small group, first-time offering benefits, or need a policy review for better rates and coverage.