



Agent MARKETING Tool Kit

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 DIGITAL 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 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 Marketing 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)

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
- 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

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 & 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

ACTION PLAN

DATE

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NOTES

Want to chat? Complete this form
and email it to
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: FIELD MARKETING

4: SERVICES OFFERED

5: NEXT STEPS

6: MARKETING AIDS



Introducing Yourself

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 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.



Joseph Krivelow



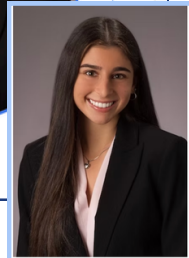
Kent Stansfield



Brian Dixon



Mari Krivelow



Get to Know Me

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!

314-943-1095

CHC Business Cards

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



Field Marketing

What is Field Marketing?

Field marketing is the direct, on-the-ground effort to connect Compass Health Consultants® with the communities we serve. It moves our brand beyond the screen and into real spaces. Whether that's a local event, a community health fair, a business fair, or face-to-face conversation.

Why it Matters:

People trust what they can see and experience firsthand. Field marketing gives us the opportunity to build genuine relationships, educate potential clients about their health insurance options, and represent CHC's values of being professional, positive, and approachable in person.

Marketing Materials:

Materials you can use when you are in the field

- Flyers
- Trifolds
- Brochures
- Business Cards
- Tablecloths
- Signs
- Swag (shirts, cups, pens, notepads, etc.)
- & More

If you are heading to an event and in need of some swag or to use a tablecloth or banner, we ask that you use the link below to request what you need.



[CHC SWAG Form](#)

We have good news! All of this can be done through CHC. Your physical papers (trifold, brochures, business cards) can all be designed by the CHC Marketing Team! If you are interested in working with the team, please fill out the form below so we can get started!



[CHC Marketing Form](#)

Where should I go for field marketing?

Great question! You have so many options (probably more than you think).

- Community events
- Business fairs
- Career fairs
- Conferences
- Festivalss
- Libraries
- Medical Facilities
- Partnering with local businesses



**** Don't forget to take photos and send them to marketing@chcquotes.com
We want to see what you are up to and share how awesome you are!**



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.



www.chcquotes.com

www.chcbrokers.com/yourname

Branding Kit

What is a brand kit? A brand kit is a collection of the core visual and tonal elements that define how Compass Health Consultants® shows up across all marketing and communications. It ensures that every piece of content looks and feels consistent.

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

STONE

- 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
 - ▶ 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

Take What You Need

How to fill out your flyer in Adobe Acrobat:

Step 1: Download Adobe Acrobat → Step 2: Open the file of the flyer. It should open Adobe Acrobat automatically → Step 3: On the top left tool bar click "Edit" → Step 4: Click "Prepare a form" in the bottom left → Step 5: Click "Text field" → Step 6: click where you want to type. A text box will appear → Step 7: Move & resize text as needed → Step 8: Save your finished flyer. Click "Save to computer" Give it a name and click "Done" → Step 9: Open your new flyer and fill in your info.

Flyers

Compass Health Consultants®

How CHC can help you with your insurance needs:

- ✓ Licensed in 48 states - We are ready to help you wherever you are!
- ✓ 200+ of the best carriers - So we can fit a plan to you, not you to a plan.
- ✓ Many trusted agents that can help you navigate a confusing time in a personalized way.
- ✓ BBB Accredited Business
- ✓ Health Insurance Consultant of the Year 2026

LEARN MORE TODAY

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Compass Health Consultants®

About CHC

Compass Health Consultants® is dedicated to helping individuals and families find the right health coverage to fit their needs and budget. We partner with trusted insurance providers to offer a wide range of options. Our goal is to simplify the insurance process and give you peace of mind knowing you're protected.

- ✓ Licensed in 48 states - We are ready to help you wherever you are!
- ✓ 200+ of the best carriers - So we can fit a plan to you, not you to a plan.
- ✓ Many trusted agents that can help you navigate a confusing time in a personalized way.
- ✓ BBB Accredited Business
- ✓ Health Insurance Consultant of the Year 2026

Let's Work Together

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FINDING A QUALITY PLAN IS SO EASY

CHC does it in three ways

Counsel	Choice	Convenience
When you work with us, you gain a partner. We take time to understand your goals, priorities, and budget. Then, we build a customized plan that fits your needs and gives you complete peace of mind.	With 200+ trusted insurance carriers and 2,500+ plan options nationwide, we're equipped to meet a wide range of needs. No matter your situation, we're here to help you and your family find the right fit.	We make insurance simple and stress-free with easy access, digital processing, flexible options, and expert guidance. We want to make it so you can get the coverage you need with confidence and peace of mind.

www.chcquotes.com **Learn More** →

Social Media Posts

DON'T WAIT UNTIL YOU NEED IT

Review your health insurance coverage TODAY!

GET A QUOTE NOW

📞 636-561-5739 🌐 www.chcquotes.com

DID YOU KNOW?

Health insurance plays a crucial role in improving health outcomes and extending life expectancy.

www.chcquotes.com

LET'S FOCUS ON

Three Insurance Essentials

TO REVIEW EVERY YEAR

→

CHC Presentation

Compass Health Consultants®

We are committed to helping families, individuals, and groups get the absolute best health insurance coverage for their unique needs.

CHC Letterhead

Compass Health Consultants®

ADDRESS: [Redacted] CONTACT: [Redacted] WEBSITE: www.chcquotes.com

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 :

Instagram
@compasshealthconsultants_

Facebook & LinkedIn
Compass Health Consultants

TikTok
@Compass.health.co

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.

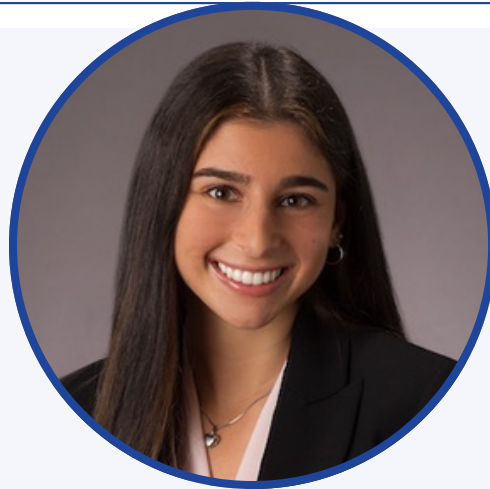
Utilize highlights, reels, stories, feed & more!

EXAMPLE 1



EXAMPLE 2





MARI KRIVELOW
MARKETING MANAGER



LIZZY BENNE
MARKETING SPECIALIST



Jalen Wadlington
MARKETING SPECIALIST

HAVE MORE QUESTIONS?

Don't hesitate to reach out!



636-561-5739 ext. 10



marketing@chcquotes.com



<https://calendly.com/mkrivelow>

