



## **KY SISSON: AGING & AWESOME**

### AGENTMETHODS CASE STUDY

Insurance agents are constantly seeking innovative solutions to streamline operations, enhance client engagement, and drive growth. Ky Sisson, an insurance agent who focuses on Medicare sales, turned to AgentMethods to address these challenges.

This case study explores Ky's business and how AgentMethods has made an impact by highlighting significant improvements in operational efficiency, client engagement, and marketing effectiveness.

Ky quickly found that selling insurance had its challenges. He encountered inefficiencies and time-consuming tasks that all insurance agents face. Managing a website, creating newsletters, posting on social media, and scheduling client appointments consumed valuable time that could be better spent talking with clients.

Seeking a solution, Ky discovered AgentMethods, a platform designed to streamline the online presence and marketing efforts of insurance agents.

AgentMethods®



## KY'S CHALLENGES

- **Time Management:** Significant time was spent on non-revenue-generating activities, such as website updates, newsletter creation, and social media management.
- **Client Engagement:** Engaging clients effectively and maintaining communication through newsletters and social media required consistency
- **Operational Efficiency:** There was a need for a user-friendly platform to allow easy customization and website updates without professional web design skills.
- **Appointment Scheduling:** Managing appointments, especially during the busy Annual Enrollment Period (AEP), was cumbersome and inefficient.



## THE SOLUTION

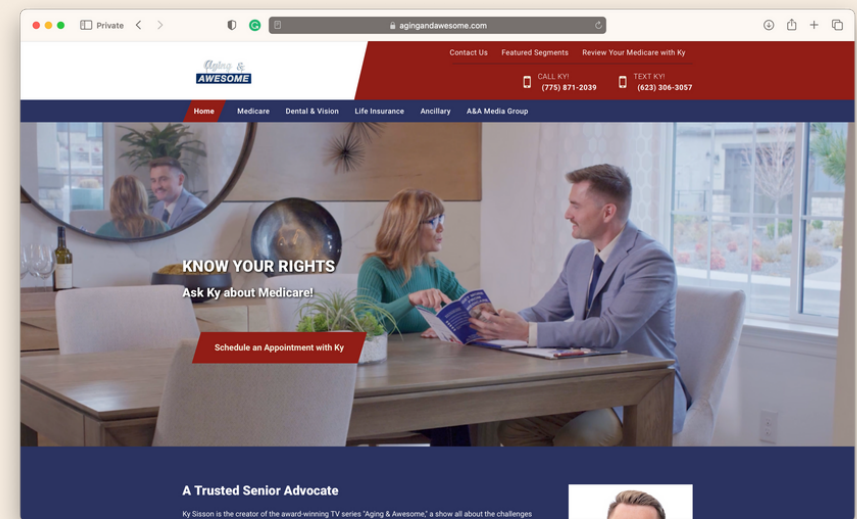
AgentMethods offers a comprehensive suite of tools designed to address Ky's challenges.

**Easy Website Customization:** AgentMethods provides a user-friendly interface for website customization, allowing Ky to update content easily and maintain a professional online presence.

**Automated Marketing:** The platform automates monthly newsletters and social media posts, significantly reducing the time required for these tasks.

**Integrated Scheduler:** The great AEP scheduler features streamlined appointment scheduling, making it easier for clients to book meetings during the enrollment period.

**Engagement Tracking:** Tools to monitor engagement metrics, such as newsletter open rates and social media interaction, helped Ky understand client interests and preferences.





## THE RESULTS

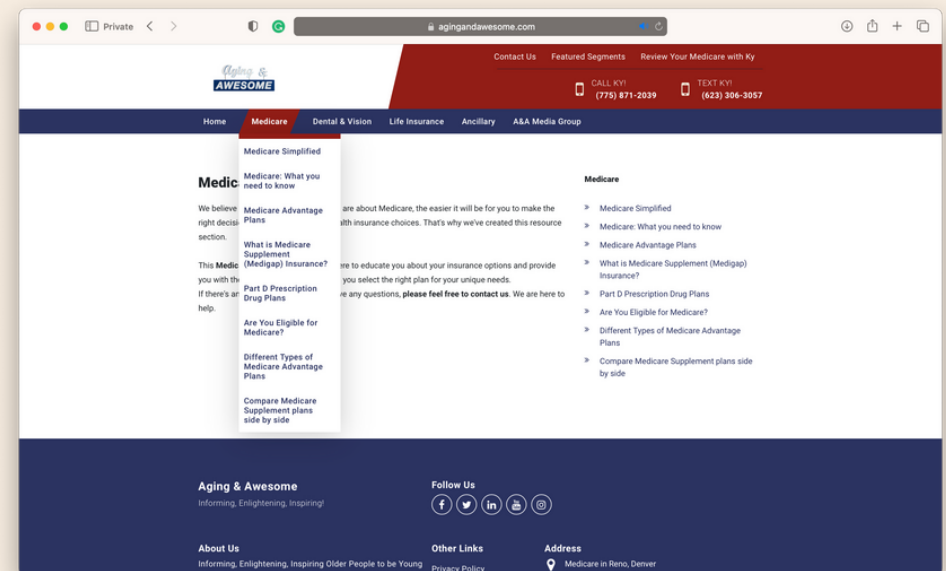
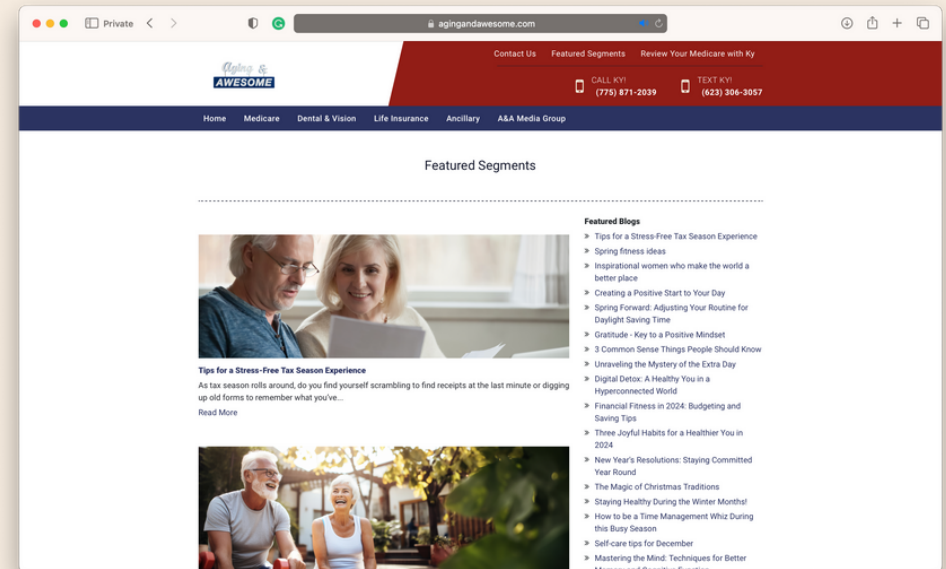
The adoption of AgentMethods led to several tangible benefits for Ky Sisson's business including ways to automate appointment setting, get new leads, and stay organized.

Here are a few that stand out!

**Time Savings:** Ky experienced a dramatic reduction in time spent on marketing and website management, freeing up hours each week for client engagement and other revenue-generating activities. By using automated systems and tools, Ky was able to streamline sales.

By spending less time on marketing tasks and more time talking to customers, Ky was able to enhance client satisfaction and ultimately boost profitability.

**Increased Engagement:** Ky's open rates skyrocketed. He saw his newsletter reach a nearly 50% open rate and cross-marketing emails increase to an almost 40% open rate. The automated social media posts also saw positive interaction, enhancing Ky's online presence. By consistently sending helpful emails, Ky was able to stay in contact with his clients all year long.





## THE RESULTS

**Operational Efficiency:** The ease of updating the website and creating content allowed Ky to maintain a current and professional online presence without the need for external web design services.

**Improved Appointment Management:** Scheduler not only automates the appointment setting process during AEP but also collects the Scope of Appointment forms and tracks the 48-hour rule.

Ky Sisson's experience with AgentMethods shows the true value of digital marketing. Ky transformed his business operations, saved time, improved client engagement, and increased sales.

Insurance agents can use the AgentMethods platform to drive growth and success, making AgentMethods a pivotal tool for agents who aim to streamline their operations and focus more on what truly matters - their clients!

