

# HOW TO POSITION YOURSELF AS A LEADER IN INSURANCE



# The Visibility Paradox

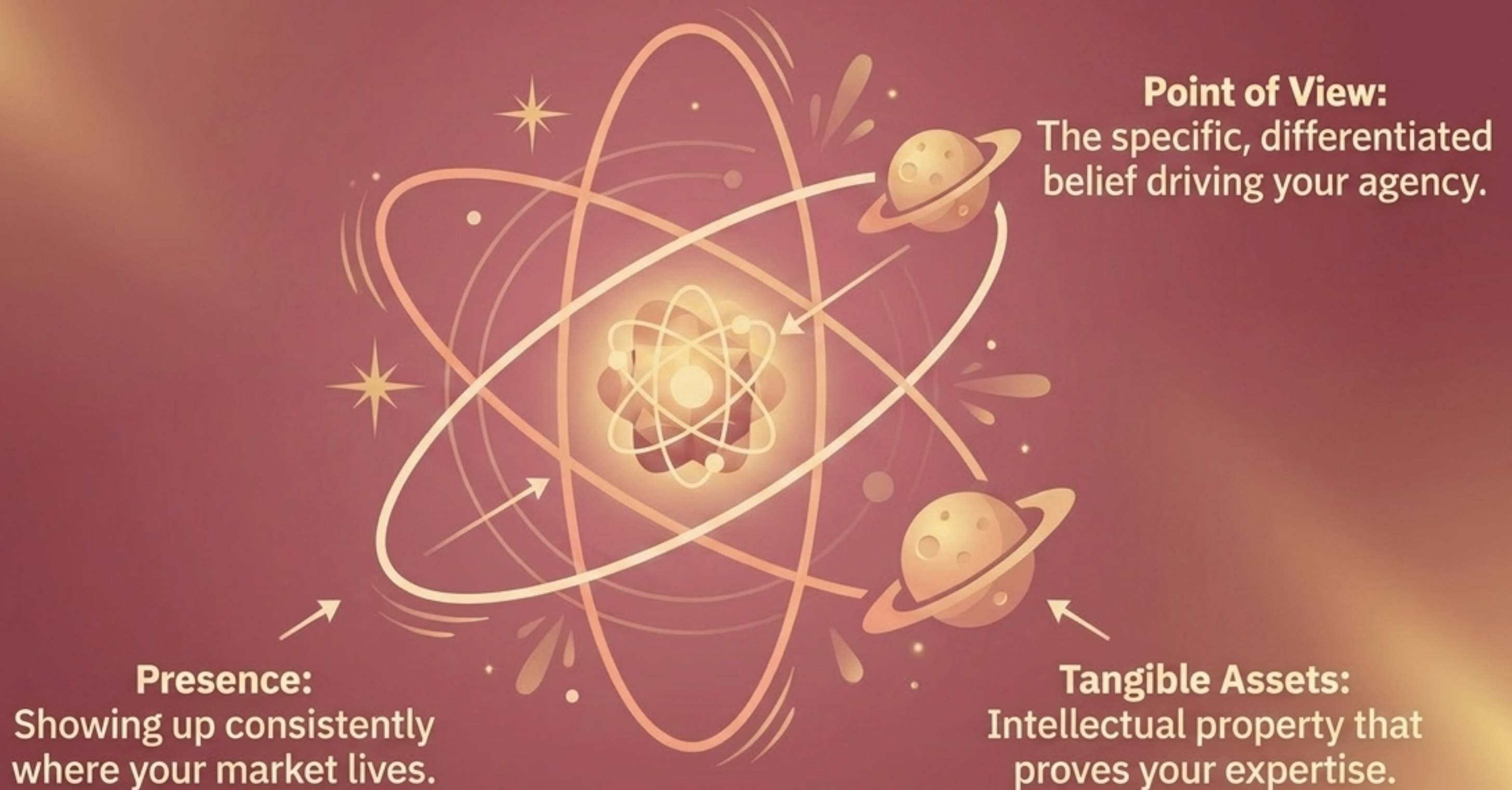


**Talent without visibility gets buried.  
Activity without strategy leaves  
you busy and broke.**

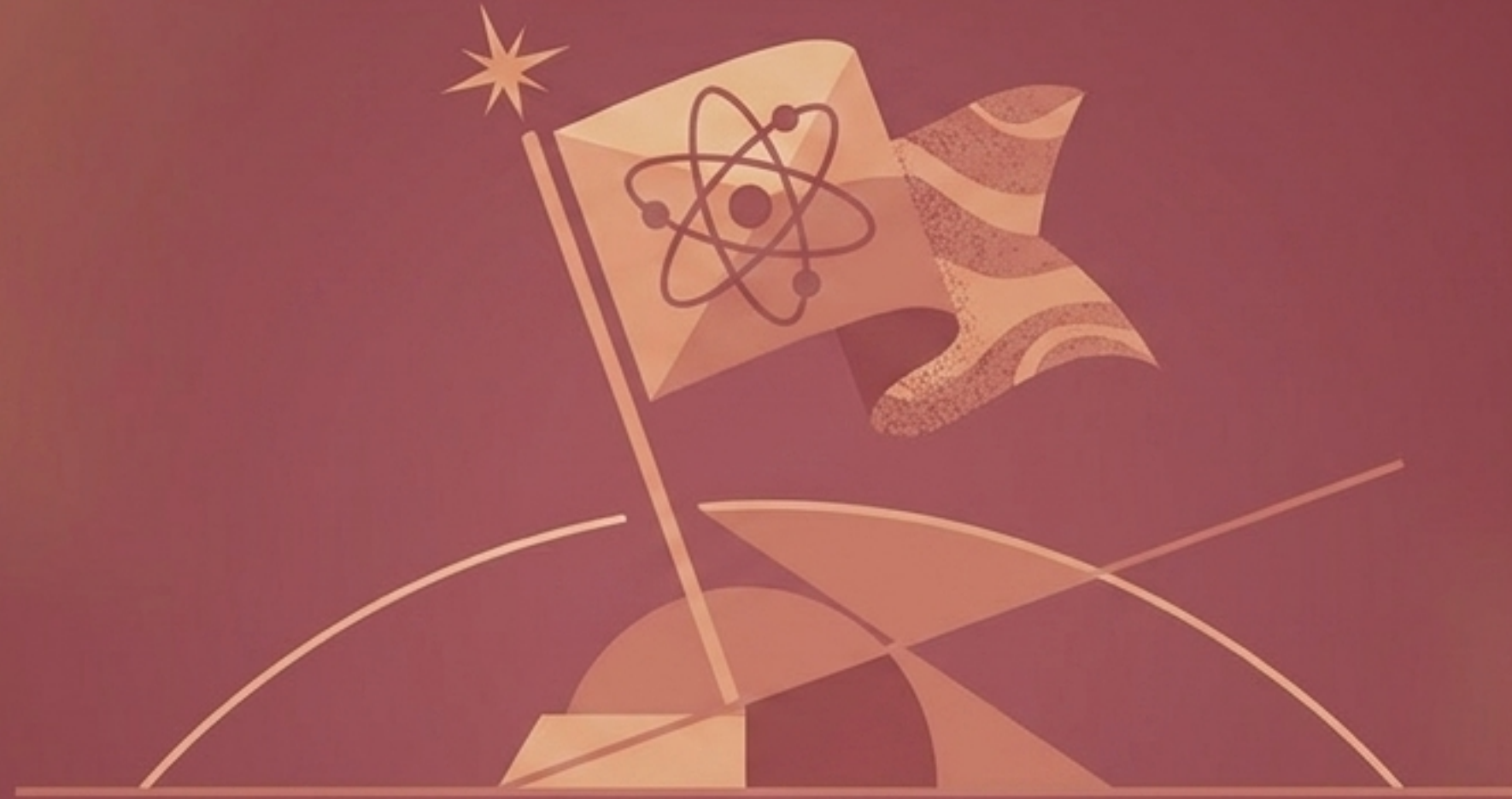


**Talent combined with targeted  
visibility compounds. Clients reach  
out. Producers ask to join.**

# The Architecture of Authority



# Plant Your Stance



Most agents try to be everything to everyone, which means they sound like everyone.  
The antidote to commoditization is a clear, specific belief about your market.

Examples of a stance:

- “Medicare beneficiaries are over-insured because no one explains the math.”
- “Small business owners are dramatically underserved on supplemental products.”

# Tangible Proof



**Signature Framework:**  
Your stance structured into  
3-4 repeatable, named steps.

**Flagship  
Content:**  
A definitive guide, book,  
or video that proves depth.

**Functional Resource:**  
A useful checklist or worksheet  
exchanged for a relationship.

**Social Proof:**  
The accumulated evidence of  
trust via reviews and features.

# The Channel Stack

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1. Social Platform: Facebook/YouTube for Medicare, LinkedIn for B2B, or regular written column.
  2. Long-Form Channel: A podcast, YouTube series, or local sponsorships.
  3. Real-World Community: Library classes, Chamber events, local sponsorships.
  4. Referral Partners: 10-15 allied professionals (CPAs, estate attorneys).

# Redefining Social Media



Trying to go viral

100,000 strangers scrolling past



Announcing things  
("Happy Tuesday")

Performance and bragging



Educating and answering questions

1,000 local prospects watching weekly



Telling anonymized client stories

Plain language and approachability

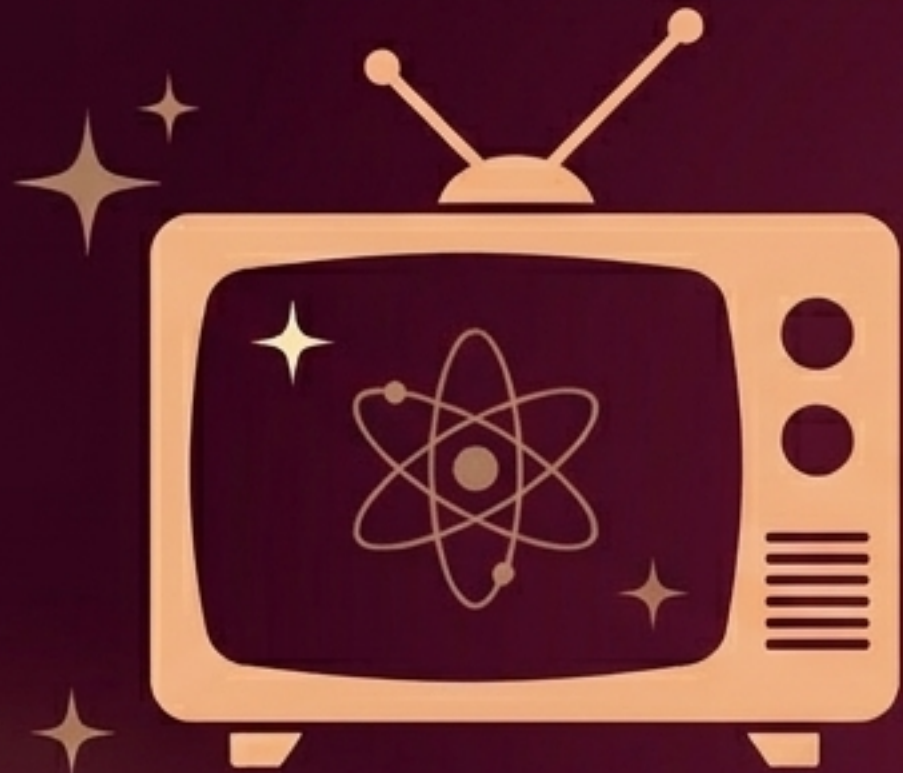
# The Conversion Content Mix



Five posts per week:

- **2 Educational** (Answering common client questions)
- **1 Client Story** (Respectful, anonymized lessons)
- **1 Personal** (Showing the human behind the agency)
- **1 Soft Ask** (Inviting a free review or a call)

# The Short-Form Formula



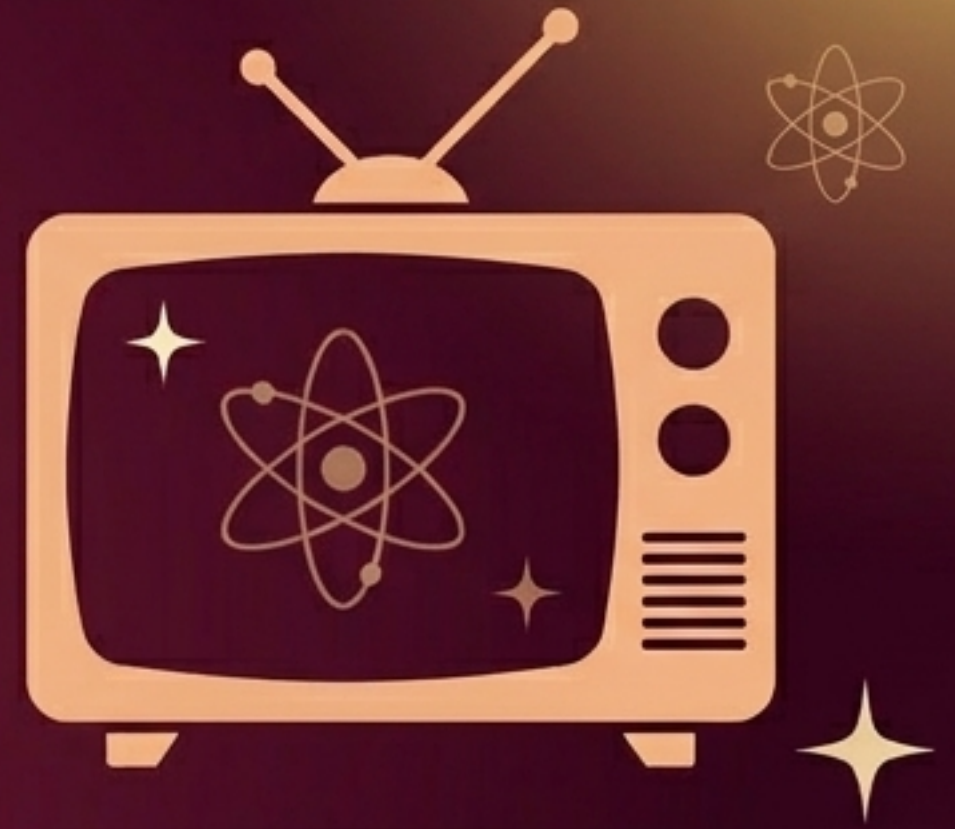
**3 Seconds**

**Hook:** A bold statement, direct question, or recognized problem.



**30-60 Seconds**


**Answer:** Deliver the plain-language answer. One idea per video. No jargon.



**1 Sentence**

**Soft CTA:** "If you have questions, send a message or call." Stop talking. Cut.

# The Power of Long-Form Stories



Stories dramatically outperform tip lists because stories make the lesson stick.

Structure of an 8-15 sentence Facebook story:

- **The Hook:** Stop the scroll.
- **The Specifics:** A real (anonymized) client situation or a mistake you used to make.
- **The Takeaway:** The core lesson and a soft invitation to reach out.

# The Consistency Engine

The agents who win on social media batch their work.

Total time: **90 Minutes** per week.



# Teaching Over Performing

The best-positioned agents don't perform expertise; they share it generously.



- Teach in plain language.

- Answer real questions.

- Answer real ceprics.

- Admit what you don't know.



Performance is brittle. Generosity compounds.

# The Compound Effect



**Years 1-3:** Compounding authority. Local media features, referral partnerships, and producers asking to join your agency.

**Months 6-9:** Direct messages become appointments. Social media drives consistent inbound clients.

**Months 1-6:** Boring, steady execution. Answering questions. Small audience.

# Avoid The Traps



**Impatience:** Quitting at month four of a three-year build.



**Generalizing:** Trying to lead on six topics instead of owning one specific lane.



**Illusion of Competition:** Comparing your local agency to national TikTok influencers.



**Hollow Presence:** Seeking national reach while ignoring your 50-mile local foundation.

# Your Action Plan

This week, execute these three steps:

## 1. Write Your Stance:

One sentence on what you believe that not every agent agrees with.

## 2. Pick One Platform:

Block 90 minutes this Tuesday to map your framework and record your first 5 videos.

## 3. Start Before You're Ready:

Do not perfect it. The agents who win start now and get better in public.

