

The 2022 Insurance Agent's Road Map to Success



AgentMethods®

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Your 2022 Destinations:

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Time flies, and before you know it, you're putting together another strategy to improve retention during the next big Annual Enrollment Period.



Are you ready to help your clients get the best coverage in 2022?

Open enrollment provides plenty of opportunities for agents to expand their client base, but it also presents new ways to satisfy returning clients. Your primary objective this year needs to be building a strategy around the value you bring to the table. It is the value you provide that will keep the likes of Joe Nameth from swooping in during open enrollment to steal clients and prospects.

With so much variety and choice at their disposal, clients are more equipped than ever to get the best deal on their Medicare. What does that mean for the insurance agent? That being proactive is the number one way to ensure your success.

At AgentMethods, we believe sales is a journey, not a destination. That's why we've put together this 2022 Roadmap for agents like you. Each step will help you strengthen client bonds, build new relationships, and make your business more successful than ever.

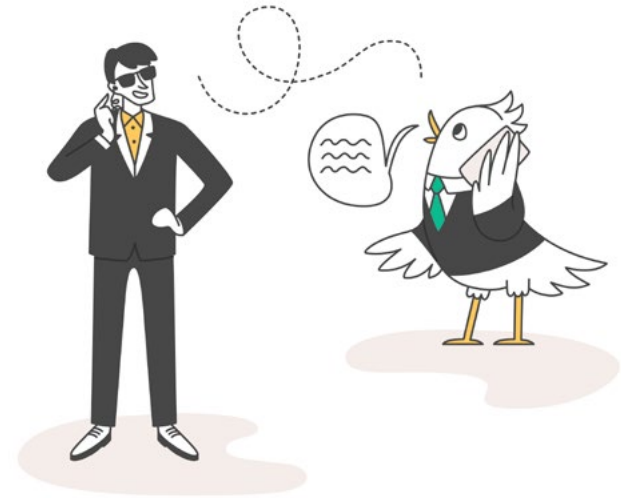


Retention

Staying in touch with clients is important. Regardless of what methods you use to stay connected, it shows you are invested in them. Show your clients that they are more than just another policy.



Other agents and insurtech companies are betting on you to forget your clients between the Annual Enrollment Periods. When you are missing-in-action, they are doing everything they can to take your clients.



Fortunately, there is a simple, three-step process you can adopt as you build your strategy this year:

- Build trust
- Show value
- Stay relevant

Remember, not speaking between open enrollments is not the only issue. Sending too many messages or failing to connect on a personal level can also cause clients' loyalty to dwindle. Finding the right balance is crucial.

Focus on building relationships to strengthen your connection with clients. Hint: Insurance isn't the answer.

While you may be selling insurance policies, you're in the business of people. Share things that are relevant and relatable like personal interests, health and wellness, wealth and finances, family, hobbies, etc. Take a genuine interest in your clients and their well being. It is about getting to know your clients and remembering the details to bring up in future conversations.

To avoid constant bombardment with messages, use a [centralized platform](#) where you can easily stay in touch. Social media is the perfect place to create a network of clients using tools such as Facebook groups. Social media is also the prime tool for creating value that isn't intrusive or over-the-top salesy.

Aim to post a mix of business-savvy insurance tips and general lifestyle posts. As you learn more about your client, you will learn more about what type of content they would like to consume. Also look for opportunities to make your content engaging through the use of poll questions or quizzes.

Consider creating a monthly newsletter your clients will want to read. Make listicles with health tips, practical guides, and other information your clients enjoy. It doesn't have to all be insurance. In fact, by writing more diverse content, it becomes easier to tie in coverage, feel more like a lifestyle newsletter, and most importantly shareable with others.

If you need help keeping your clients engaged, [AgentMethods](#) can help. Easily send pre-written newsletters and post engaging social media content without the headache.

Learn How To Keep Your Clients Happy

Referrals



Once you know how to keep your existing clients happy, it's time to focus on expanding your prospect funnel.



Agents benefit greatly through referrals. They are arguably the best way to grow your business. Similar to retention, mastering referrals is all about trust and awareness.

Trust is something to be earned and cannot be forced or fabricated. Timing is important when seeking out referrals. Make sure you're sending the right messages at the right time. This is where your social media and newsletter come into play.



What To Do

Sending friendly referral reminders on top of your usual content allows you to stay on top of your clients' minds.

People love to help others, and that includes you. As an agent, your relationship with your clients will always be your most valuable marketing tool.

Whenever possible, strive to build a consistent, non-intrusive presence in your clients' lives.

Rather than over-marketing your products and policies, focus on the value your knowledge and skills bring to the table. When the next AEP comes around, clients will know who to refer their friends and family to because in their mind you are the leading expert on insurance.



[AgentMethods](#) allows you to easily strategize your marketing with automated invitations, scheduling and digital reminders. This makes it easier than ever for agents to stay at the front of their clients' minds. **Agents using AgentMethods see an average of 60% more referrals than those who don't.**

[Learn How To Get More Referrals](#)

Cross Selling

Don't let the numbers alone fool you. More clients does not always equal more money or higher profits.

Studies show that acquiring a new customer is five times more expensive than making a sale to an existing customer. If it's so costly to take on new clients, why do the vast majority of marketing efforts focus on client acquisition?



The real value and greatest profit can come through selling more products to current customers.

It works because they already have trust in what you do. Additionally, delighted clients are more likely to refer business which saves you time and marketing capital when building your business.

Creating marketing campaigns is expensive and can be time consuming. From running ads to paying designers to creating promotional material, agents spend thousands of dollars every year on client acquisition marketing.

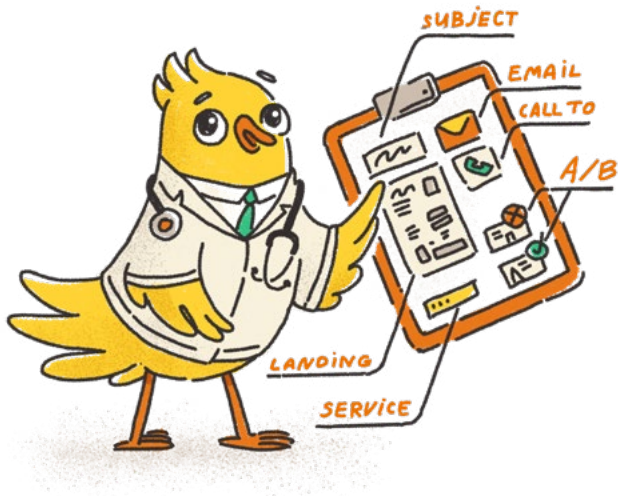
While email marketing platforms make it easier to manage your campaigns, you still must develop new ideas. Write content, create a design, and test them to attract the attention of a new client. And if you don't have a strong email list of prospects to start, you may wind up throwing hours into your marketing for little reward.



What To Do

Begin building a client email list. It's okay to start small. Ask every client for their email address so you can send your new newsletter (remember that?) and important policy information. Always take value to the table and provide personal customer service.

To speed up the process, take advantage of an email marketing service that is built specifically for insurance agents. With [AgentMethods](#), you can send pre-built email campaigns complete with launch-ready landing pages to sell more products to your current clients.



Using AgentMethods, Carl was able to set up and send 197 emails about critical illness to his consumer base. The non-intrusive manner of email empowered his clients through choice. Clients received the most relevant information to make the best decisions for their lives, and Carl was positioned as the go-to solution.

The result: within 24 hours, Carl had 14 appointments added to his schedule.

Set up a call with [AgentMethods](#) to learn how you can put all your cross-marketing campaigns on autopilot. You won't believe how easy it is!

Mini Case Study

Automation

Efficiency is the name of the game. You must have as much time as possible to focus on delivering the best solutions to your clients.



Helping customers should always be the guiding principle of your actions, which means you need to automate anything that distracts from providing unbeatable service.

All your social media posts and email marketing campaigns should be set up with an automated manager. Plan your posts and emails months in advance and keep clients engaged with information and insurance tips.

Staying on top of marketing can easily take up several hours every week. Far too many agents launch websites, blogs, newsletters, and Facebook pages only to abandon them later. What does this look like to clients researching you? They'll think you're too busy to provide content, which makes them wonder if you'll be too busy to provide great service.



What To Do

Automation today requires a commitment to technology. From determining what content to post to when the best time to cross-market, your marketing platform must understand the nuances of marketing insurance products.

A marketing platform like [Great AEP](#) allows you to follow up with new web leads, automate responses, and schedule appointments with prospects and clients before they turn to someone else. The platform is fast, efficient, and delivers high quality content. Research shows customers prefer it to traditional marketing methods!



Some things truly need to be seen to be believed. Sean was hesitant at first but decided to use Great AEP to automate his appointments during AEP. Before the Annual Enrollment Period even began, Great AEP helped him schedule more than 400 appointments - all without a single phone call or email!



Start Automating Today

Mini Case Study

Modernization

In 2021, there was over \$10 billion invested into insurtech startups. Their goal? To put independent insurance agents out of business.



The digitalization of insurance is not going to stop, but agents who adapt will be able to beat the system. Those who fail to modernize will fall behind and will eventually lose their clients to big business.

How does a single agent stand up against a multi-million-dollar company? You start with the tools available to you. Luckily, there are plenty of resources and platforms that are affordable and easy to integrate. Great AEP is one of them.

Your goal for 2022 must be more than just surviving as an entrepreneurial business. To survive and grow, you need to deliver policies through a modern, streamlined agency system utilizing the most powerful tools to help customers and sustain its growth.

Did you know 81% of all purchases today start online?

If you are not visible online, in email, or on social media, your insurance business does not exist. The pandemic has pushed seniors to adopt modern technology and the majority say they will continue to use the internet to meet their needs.

Now that they have more options, you will have to make the necessary upgrades to your business to measure up to the competition. If you don't take the time to update your website, insurtech will beat you to it and take your clients in the process.



Whenever a challenge presents itself, it is important to understand where you currently stand. Start by conducting a detailed website assessment to make sure yours is just as good as any startup's.

We've put together this agent-tested list to give your site the edge it needs to bring in new business in 2022. Look at your site and ask yourself these questions:

01 Is your site focused on value or sales?

02 Are there several ways for leads to contact you?

03 Does your website align with your current marketing campaigns?

04 Have you integrated online scheduling that's easy to find and access?

05 Have you built landing pages that convert and link back to email campaigns?

06 Are there detailed and varied calls-to-action that appeal to different clients?

07 Does your website easily scale (responsive design) to fit various mobile screens?

08 Do you have images that show relevant people and activities related to your product?

09 Is there a clear call-to-action on your homepage related to your top-selling product?

10 Are all products, bios, Medicare information, dates and ACA details current and accurate?

11 Does your website's design look comparable in a side-by-side comparison with insurtech startups?

12 Is your website easy to update and align with your current marketing initiatives and business focus?

Are you feeling overwhelmed? Don't worry, [AgentMethods](#) can help! Let's chat and start putting together a 2022 plan!

You don't need the budget of an insurtech startup to provide the same level of technology and service. Schedule a meeting with AgentMethods now to learn how to modernize your agency, grow your business, and make the 2022 AEP your most profitable yet!



Schedule a 1-on-1 Demo Today!