

Marketing Resources



Quoting System Comparison

Vendor	Description	Products	Exchange Sync	External Quoting & Self Enrollment	Internal Quoting	CRM	Cost
Quotit	Quotit has been helping insurance professionals for over 20 years. Through plug-and-play tools, take advantage of the professional quoting engine, compare, and enroll functionality, a client driven shopping experience, a full CRM and a streamlined enrollment process.	On/Off exchange health, ancillary (Dental, Vision, Life, Critical Illness, etc.)	No - Application download	X	X	X	\$50 per month for IFP/ \$75 per month for Group and Individual
HealthSherpa	A FREE platform to quote, enroll, and manage your ACA business. This is easier and faster than healthcare.gov. 1095s at your fingertips, post-enrollment support, white-labeled website for customers to self-enroll. Quick and easy to use. Changes made through the platform are reflected on healthcare.gov and carrier portals	On exchange health plans only (under 65)	Yes - FFM states only	X	X	X	Free
INSXCloud	The INSXCloud Broker Platform enables brokers to quote, directly enroll and track applications on the Federally Facilitated Marketplace and more. Quickly generate quotes, create PDFs of plan comparisons, enroll your customers in plans, and invite customers to enroll themselves through this FREE cloud-based web portal.	On/Off exchange health, ancillary (Dental, Vision, Life, Critical Illness, etc.)	Yes - FFM states only (ancillary in all states)	X	X	X	Free when you get appointed with Friday Health and IHC
Ebiz/ HealthConnect	HealthConnect is a quoting system that allows access to multiple carriers in multiple markets. HealthConnect offers a variety of quoting plans and has a selection of offerings from ancillary carriers.	Health Off and On exchange	No	Somewhat, proposal initiated by the broker, then client prompted to self-enroll	X	X	Free (individual, med supp, and group)

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CRM Comparison										
Vendor	Description	Calendar System	Email Mktg.	Chat Feature	Lead Tracking	Marketing Automation	Task Mgmt	Territory Mgmt	Track Commission	Carrier Quoting
www.Monday.com	With Monday.com work teams can create and manage workflows. Marketing, CRM, HR, Software development, Construction, Video Production and more. 24/7 Support. Automations. GDPR Compliant. Collaborate Online.	X	X		X	X	X	X		
www.HubSpot.com	View your sales funnel on a clean dashboard. Sort by deals won and lost, appointments scheduled, contracts sent, and track performance against quotas. Sort deals by name, owner, amount, or stage with custom filters available.	X	X	X	X	X	X			
www.zoho.com	Zoho is an Indian web-based online office suite containing word processing, spreadsheets, presentations, databases, note-taking, wikis, web conferencing, customer relationship management, project management, invoicing, and other applications.	X	X	X	X	X	X	X		
www.Pipedrive.com	Tracking leads and optimizing your sales pipeline. Focus on the activities that transform leads into customers. Integrate with hundreds of supporting lead generation apps and mobile CRM gives you access on the go.	X	X	X	X	X	X	X		
www.AgencyBlock.com	AgencyBloc helps life and health insurance agencies grow their business by organizing and automating their operations using a combination of an industry-specific CRM, commissions processing, and integrated business and marketing automation.	X	X	X	X	X	X	X	X	
www.NextAgency.com	NextAgency includes CRM, marketing, and commission management tools. Save with automated workflows, email and calendar integration, reports, integration with Ease, and much more. Designed for life & health agencies. NextAgency supports individual, group, and senior sales.	X	X	X	X	X	X	X	X	
Quotit (Contact Dickerson for discount pricing)	Organize client and lead information in one place to personalize outreach, improve customer satisfaction, and drive more revenue. Even set reminders for events such as birthdays, plan renewals, and the open enrollment period.	X	X		X	X	X			X

Marketing Resources

Content and Marketing Material Resources

Name	Pricing	Description
www.dickerson-group.com	Free	Dickerson offers exclusive white label marketing material for all your needs. For agents who partner with us, get dozens of free templates to add your logo on, print, and share online. We're constantly uploading new content!
Carrier portals	Free	Carrier broker portals will have marketing tools and documents that you can use as your own. Visiting the broker portal, you can download their marketing material and add your branding.
www.canva.com	Free/up-grade	Canva is the online platform that makes designing easy. With thousands of professionally made templates to get you started, create, customize, and share your designs in a few clicks. Professional brochures, stunning videos, to workplace presentations, it's never been easier to achieve your design goals.
www.crello.com	Free/Up-grade	Graphic Design software provides users with the necessary features to design, edit, and publish graphics or images. Animation software allows for the creation of moving graphics on a frame-by-frame basis. Each frame is the equivalent of a single drawing or image.
www.Pexels.com	Free	Pexels is a free photo and video library that helps creative people bring their stories and ideas to life. Millions of people all over the world rely on the Pexel community of photographers for fresh, authentic, and diverse imagery.
www.Pixlr.com	Free/up-grade	Pixlr is a family of web-based and native mobile image editing applications. It is built using Flash; thus, it requires the plug-in to work. It is free to use and comes with no enterprise pricing fees. Pixlr is great for editors who need mobility.
www.Vistaprint.com	Varies	Vistaprint is a global e-commerce brand to use to promote your business with quality printed and digital marketing products at an affordable price. The online design studio allows customers to easily customize their products including business cards, marketing materials, signage, promotional products, apparel, websites, digital marketing, cards and stationery.
www.Stocklayouts.com	Varies	StockLayouts design templates are available for both Mac and PC platforms. The customizable templates are created and produced by award-winning graphic designers and seasoned production artists. They include royalty-free stock photos and original artwork. All layout files and graphics are high resolution and suitable for commercial printing.
www.mycreativeshop.com	Varies	MyCreativeShop is an online design company that allows anyone to create awesome designs that can be printed and shared anywhere.

How to Build an Online Presence

Tips	Details	More Information
Create and find your content	Start with Dickerson's collateral on the broker marketing portal. Create additional graphics and make videos using the free resources from the collateral page.	In addition to creating your own collateral/content, search online for articles, videos, and lighthearted insurance related pictures (funny pictures are always great). Save those to a "content" folder on your computer. If you go to expos or events, take selfies, and make notes of who you're with and where you're at. That way, you have a library of content to readily post.
Create your business pages	The more you have online means more can pop up in a google search. Setting up your business page is relatively the same for each platform.	~Business.google.com ~biz.yelp.com ~facebook.com (click+, then "page" to create your business page. ~Linkedin.com ~Instagram ~Twitter ~Youtube.com
Post on all platforms	Whatever you post, make sure to do it on all platforms, especially your google page. The more you post, the more your results show up on the search engines.	Whenever you post, be sure to ALWAYS include the following: 1. name 2. agency name (if any) 3. PHONE NUMBER 4. email 5. website (if any) 6. links to your other pages
Post regularly	Like any major franchise (Nike, Coca-Cola, McDonalds, etc.) consistency is key. Most brands post the same content, over and over.	Utilize a social media calendar method. For example, post something light-hearted/funny every Monday, post something informative every Wednesday, and post an FAQ Friday, or just promoting your business (who you are, what you do, clients you're looking for, and how to contact you.)
Create Videos	People engage more with videos, and if they see yours answering questions, they are more likely to work with you.	Record yourself answering common questions (e.g., what's the difference between an HMO and PPO, or How much does insurance cost). When someone googles that question, your video can show up.
Get your friends involved	Ask your friends and colleagues to like, comment, and share your posts.	Having your friends share your posts, will make your post more visible. You can incentivize people to share your posts by offering a raffle, something small like a gift card to be given randomly to one lucky person who shares your post.
Tagging/ Hashtag	Hashtags help your content get lumped into other categories and boost your posts. For example, if someone looks up "when is open enrollment" and you #openenrollment, your posts will attach to other articles and webpages with the same content.	When posting pics from events and expos, tag the people you are with, tag businesses you are with, so they can see your content, like and share it. Here are some other hashtags you can use: #openenrollment #whenisopenenrollment #coveredca #insuranceagentnearme #healthinsurance #copays #deductibles #healthcare
Purchase Ads	If you are looking to spend a few dollars, places like ads.google.com and boosting your Facebook posts, there's no minimum order, and no contracts.	Example, on your FB business page, you can spend about \$20 to boost a post to people within your local area. Filtering your audience, you can reach several thousand people over the course of a week, with just a few dollars.

Marketing Vendors

Name	Description	Services
www.321 Web-Marketing.com	This SEO company believes that campaigns can only improve through the data that is tracked. Each month they analyze data and trends and adjust our clients campaigns to ensure maximum results.	<ul style="list-style-type: none"> -Content Marketing -Digital Marketing/Email Marketing -Inbound Marketing -Local Listing -Market Research -Marketing Consulting/Strategy -Pay-Per-Click -Search Engine Optimization -Social Media Marketing -User Experience/User Interface -Web Design/Web Development
www.agencymarketingmachine.com/	Agency Marketing Machine provides comprehensive marketing programs focused solely on insurance agencies. The programs build agency relationships, driving referrals and increasing retention.	<ul style="list-style-type: none"> -Logo and branding -Website design and development -Social media management -Monthly newsletter marketing -Mortgage broker & realtor lead program -Community relations management -Public Relations -Video production and video marketing -Lead generating email & Facebook campaigns -Retargeting ad campaigns -Referral marketing system
www.MusselwhiteMarketing.com	Musselwhite understands that as a Business Owner it is your job and responsibility to implement systems and processes to BUILD and GROW your business! They wrote the book on the 7-Pillars of Digital Marketing: 1) Websites 2) Content 3) Email 4) Online Ads 5) Video 6) Social Media 7) Reviews & Testimonials BONUS: Digital Marketing Training	<ul style="list-style-type: none"> -Content Marketing -Customer Relationship Management -Digital Marketing/Email Marketing -Inbound Marketing -Local Listing -Marketing Automation -Marketing Consulting/Strategy -Pay-Per-Click -Reputation Management -Search Engine Optimization -Social Media Marketing -Video Production -Web Design/Web Development
www.Neilson-Marketing.com	100's of clients served with over 100 years of combined experience. Specializing in SEO, PPC, Website Development, as well as U.S.-based Telemarketing, Agency Lists for Sale, and much more. Click here to find out how we can maximize your chance for success.	<ul style="list-style-type: none"> -Content Marketing -Email Marketing/Inbound Marketing -Local Listing -Pay-Per-Click -Public Relations -Reputation Management -Search Engine Optimization -Social Media Marketing -Video Production -Web Design/Development
www.ConfluencySolutions.com	Simple is better, from websites to SEO to social to paid search to e-newsletters. Confluency has specialized in getting quality leads for insurance agencies through digital marketing since 1984.	<ul style="list-style-type: none"> -Branding/Positioning -Content Marketing, Email Marketing, Inbound Marketing -Local Listing -Marketing Consulting/Strategy -Pay-Per-Click -Reputation Management -Search Engine Optimization -Social Media Marketing -User Experience/User Interface -Web Design/Web Development

Organic Lead Generation

Tip	Description
Lunch Table Quotes	If you know anyone who works at a company with lots of employees, ask them if you can setup a quoting table in their workplace cafeteria. Make it clear that you're not going to pressure or interrupt any of their employees, but you'll setup a table and a sign advertising free quotes for anyone who wants to save money. Pitch it like you're doing them a favor, not the other way around.
Get old leads from agencies that are closing	If you know an agent shutting down their agency or selling it over to someone else, ask if they have any old leads you could buy off them. Chances are decent they won't care since they're leaving the industry and may be open to a fair cash offer. While you're at it, make sure to ask what's happening to their phone number. You might be able to make an offer for that too, and forward it to your line.
Local Business cross referrals	Talk with other local businesses, especially those that are really close to your agency and offer to pay for the cost of a gift certificate to their store once a week or month if they collect business cards for the drawing and give you the contact information. Or just offer to convert the leads onto a spreadsheet for the other business owner in exchange for letting you have the information.
Marriage/Engagement Announcements	A lot of people who get married or engaged put announcements in the local newspaper. These couples are the perfect target for insurance agents because they're often looking for new policies like life or home but they're also entering a new life stage and should be more receptive to conversations about the value of a trusted insurance agent.
Exchange your leads with other local businesses	I'm sure most of the local business owners around you would love to get their hands on your customer list for sales leads. Of course, you aren't going to give that out to anyone, but if you can find a few other local entrepreneurs you can trust who also have lists of their own, consider exchanging information.
Facebook feeds	If you're an avid Facebook user and you pay attention, you'll realize that your news feed is full of sales opportunities. People having babies, getting married, buying cars, houses, and other cool stuff that needs insurance.
Connect with an accountant	A recommendation from an accountant is very powerful. It's like your dentist recommending a toothbrush. It takes more than a causal relationship with an accountant to generate leads, but if you can gain their trust and help their business, accountants can be a really great source of leads. I know a couple agents who've grown considerable sized books almost exclusively from referrals from a close accountant friend so I know it can work
Facebook groups	You can search "[YOUR CITY] business networking groups" in Facebook and you can join those. They will often allow you to post your business information, and in many cases, will host events with all local businesses
Expos	If you google your city's small business expo, you can see when they will occur. For example, Googling "Los Angeles Small Business expo" you can find out when the next expo is. the same goes for wedding expos, fishing expos, and more. Not only can you find expos that relate to your hobbies (making conversation that much easier), but it's a great way to exchange business cards and follow up with your pitch to get your foot in the door. Another popular website to check out is www.eventbrite.com
Chamber of Commerce	Chambers of Commerce are great for networking events and meeting new members of the community, but they're also great sources for leads. Many Chambers will give their members a contact list you can use to find all the other members but if that's not possible check their website for an online directory. Even if you're not a member you should be able to use the online directory of most Chamber websites to find local businesses.

Organic Lead Generation

Tip

Description

Community Events Table

Anytime there's an opportunity to show your face at a local community event you, or someone from your agency, should be there. Invest in a nice cloth banner you can drape over the table with your logo on it and give away lots of free swag. Have something to raffle or give away in exchange for leads. Good places are farmers markets, grocery stores, flea markets, and more. Your city's website will often post local events, and from there, you can contact the city department who can direct you to the right people to buy yourself a spot.

Carrier Reps

I used to work inside a major national carrier, and you'd be surprised how much business gets referred from inside the company out to the "preferred" agents. It comes from a variety of situations, but underwriters, marketing reps, sales managers and other carrier employees are constantly referring business to local agents, and it pretty much goes by who they like the most. Make sure all those people like you. It's well worth all those times you'll need to bite a hole through your tongue.

www.Score.org

Business workshops. Attending classes that are geared towards business owners, you'll be sitting next to decision makers, giving you a face to face opportunity to gain a client. www.score.org

Volunteer and charity organizations

visit www.greatnonprofits.org to find charities near you. Showing potential clients that you have a big heart goes a long way.

Follow businesses online

like and share their posts, be sure to tag them. You may even want to reach out to them for their services. For example; if you want to get your car fixed, find a local shop with a few employees instead of a big franchise. Chat them up and ask to speak with a decision maker so you can give kudos to the excellent job everyone's doing. Being excited to get praise, they'll get you in contact with the company owner.

Scour the newspapers

Whenever you file a fictitious business name statement (D.b.a. or "doing business as") in California, you are required to provide a newspaper publication within 30 days after filing. They are found in the classifieds section under: Announcements | Public & Legal Notices | Or you can visit this is a link for all CA based newspapers: <http://capublicnotice.com/Publications.aspx>

Reference USA

Free database of businesses across the country. You can export a list of companies in your local area containing executive names, addresses, phone numbers, number of employees, expenses, and much, MUCH more. Click here to watch the walkthrough

Lead Vendors

Name	Description	Minimum	Account Credit	Live Transfers	Exclusive	Shared	CRM
www.Benepath.net	Benepath is an insurance lead provider based out of Pennsylvania that specializes in producers and brokers with real time exclusive leads, aged leads, and live transfer phone leads.	Minimum purchase of \$300		X	X	Up to 5 agents	Not available - Syncs with your CRM
www.Nextgen-leads	The NextGen features integrated tools to assist with conversion and return on investment calculations. Customers that need help getting started or any assistance have a dedicated account manager.	None - Pay per lead	\$150 when you fund \$300 or more	X	X	Up to 5 agents	X
www.QuoteWizard.com	By offering unique products, filters and leads for multiple lines – auto, health, Medicare and home insurance – QuoteWizard can help.	None - Pay Per Lead		X		Up to 4 agents	X
www.allwebleads.com	By generating leads via its own web properties, click partners and search marketing this company is able to service a large number of insurance agents all over the country.	None - Pay per lead		X	X	Up to 5 agents	X
www.agents.netquote.com	Agents interested in live transfer leads can have warm leads sent direct to their phone with NetQuote's LiveLead add on service. Using LiveLead, once the prospect has been verified, the call is then transferred live to the phone number that you have on file.	None - Pay per lead		X	X	Up to 8 agents	X
www.Insurance-Leads.com	InsuranceLeads.com offers the ability to purchase leads based on predefined categories. For example, auto insurance leads are offered by the following types: custom auto, premium plus auto, premium auto, etc.	None - Pay per lead		X	X	Up to 5 agents	X