



Sales Strategy for Every Producer

I recommend that every producer have a top 25 strategy. This is a specific plan on how the producer will “intentionally” build relationships with his/her top prospects. Here is a sample plan outline.

Objective

To insure that every producer is actively marketing their top 25 prospects, we are introducing this top 25 strategy.

Requirements

Each producer will provide the sales manager with a list of their top 25 prospects. Including:

Intel

Identify top 25 prospects over (you can determine this based on your area) in total account premium. Complete a prospect profile form (key prospect intel). Obtain a high quality digital photos. Look to identify any centers of influences (attorney, CPA, Rotary, suppliers, etc.)

Contact

Visit at least once per quarter. Monthly communication (phone or email)

Sample Communication Topics

- Driving down insurance costs even further through competitive bidding
- Proven methods to reduce insurance costs
- Advantages of an independent agent
- Risk management to control costs enhance program
- Case studies of similar businesses

“The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself.”

Peter F. Drucker



Connect Consulting is a boutique marketing firm that focuses on helping business stand out and connect with the marketplace.

Win The Day!



Connect Consulting

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Solutions

- Proposal development
- Newsletters & whitepapers
- Agency marketing consulting
- Written job descriptions
- Blog development and content
- Social media integration
- Web page content
- Sales toolkit development
- Internet based drip marketing
- Risk management services
- Pre-formatted forms and reports