

Sample Plan Template for Target Marketing Effort

(Start at the bottom and work to the top)

S.O.P.
1. If program is a go – memorialize data, profile aspects into agency ongoing practices. 2. Target next cut of current book and act. 3. Decide to complete current book first or also add to new prospects efforts. 4. Do you, what, when and how add another new agency offering? If so, repeat process.



ADJUSTMENTS
1. Track results to all expectation factors. 2. Make needed adjustments. 3. Re-measure results to determine if the program is a go for the next level of expansion, further modification is needed, or the effort is terminated.



EXPAND CURRENT PORTFOLIOS
1. Execute customer data outreach to target group (sufficient to test viability of result & ability of agency to handle). 2. Qualify responses & execute sales program.



EXPANSION GAME PLANE
We selected - develop in-house: 1. Qualify your assumptions with client surveys. 2. Select 1 new offer with highest potential (agency's definition) to a select target group of qualified responses. 3. Estimate agency financial numbers & plan: all agency capital & human resources (to include staff training & its time), marketing/sales approach, target group to response to quote to issue expectations, servicing expense to include renewal, time span, general product characteristics, etc. 4. Secure carrier partner(s) & select training for staff.



DEFINE MARKET
1. Develop possible extent to which the results of the previous step reflect similar needs in your market. 2. Taking both, outline the optional responses for agency: no action, develop in-house, secure independent contractor expert(s), create strategic partnership with professional &/or a carrier, offer to others for fee earning – others.



ROUNDED CURRENT BOOK
1. Develop list of potential needs for coverages/products/services not offered by agency. 2. Look for product, marketing, sales, expertise, etc. relationships among these.