

YOUR MARKETING PLAN

customer
trend
marketing





MARKETING IS A
NEVER ENDING
CAMPAIGN





Sales People + Paperwork = Disaster

Do you need a marketing plan? YES. Does it have to feel like work to create one? NO!

I get it, paperwork is the devil. So is reading work related items (like this), so we will make this quick.

CREATING A SIMPLE (but effective) MARKETING PLAN

1. Make it FUN! If it is not fun, you will be less likely to do it.
2. Keep it SIMPLE: The more complex something is, the less likely we will use it. You can always deep dive later, but you should have something in writing to help guide you. When learning math, they don't start with quantum physics, they start with the basics and go from there.
3. It should be FLUID: Things change. New ideas may spring up. Don't think you cannot change your plan half way through or create a new campaign at any given moment. Mind you, this is not an excuse not to complete what you are working on.

How can I do all this? I am glad you asked. We have blank templates for you to use.

TEMPLATES

SIMPLE, BLANK MARKETING PLAN

[DOWNLOAD HERE](#)

Suggested Use: Print this and keep it with you. Make it a living, breathing document to track all your current and perspective marketing ideas. Then at the end of the month, review, plan your next month, and keep going!

MONTHLY MARKETING TRACKING SHEET

[DOWNLOAD HERE](#)

Want to keep a better track of your marketing campaigns? Stop guessing and start tracking!

I AM GOING TO MAKE A MILLION DOLLARS

[DOWNLOAD HERE](#)

What does that look like? Take a look at this income calculator for Medicare Supplements plus some ancillary products.

Want more alternatives? There are literally thousands of templates online you can download. Most important, use it! Remember these are fluid and you can use them however you want!



LEARN MORE

Don't Wait for Opportunity CREATE IT

Every Tuesday at 10:00 am (Central) to talk about marketing, Medicare, selling, and all things insurance agent.

Can't make it? Register and get the post notes every week!

REGISTER HERE

Need more personalized help?
Schedule a strategy session with Senior Marketing Specialists!
[CLICK HERE](#) or call (800) 689-2800

