



SENIOR MARKETING
SPECIALISTS
UNIVERSITY

DIGITAL AGENT SERIES



Making technology work for you

Designed to be used with the digital agent workshop

Presented by:
Senior Marketing Specialists
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THE NUMBERS



72% of all adults use at least one social media platform – 70% of those use it daily

45% of all adults over 65 years old use social media

Top 5 Platforms Used:

1. YouTube (81%)
2. Facebook (69%)
3. Instagram (40%)
4. Pinterest (31%)
5. LinkedIn (28%)



Do you need a website?

Yes. They are more affordable than ever. They can be a part of your overall marketing campaigns. Plus, it gives your prospects a place to see who they are doing business with.

Your website is like your digital resume. It is there to tell people who you are and your experience. This should inspire them to take action and contact you.

Don't have a website?

Senior Marketing Specialists now offers websites for agents for less than ever! Click the link below and check them out!

[WEBSITES FOR AGENTS](#)

REVIEWING YOUR WEBSITE

Is it modern looking?

- Clean
- White background
- Large title
- Logo or headshot

Easy to navigate

How fast can you or a visitor find the information they are looking for? The longer it takes the more likely they are to leave your site and find another.

Testimonials

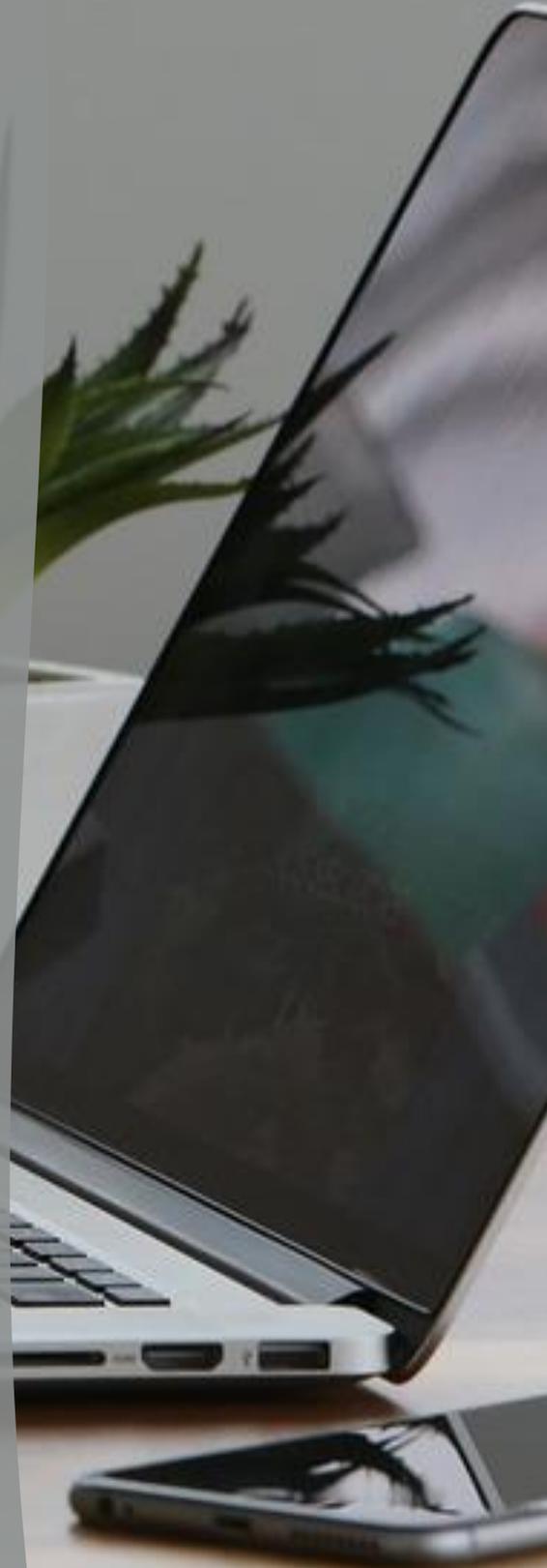
What are your clients saying about you? Social proof goes a long way!

Clear call to action on EVERY PAGE

The harder you make it to contact you, the less people will!

Mobile Friendly

Is your website easy to use on a phone or tablet? Google will let you know! [CLICK HERE](#) to test your site!





Should you be on Facebook? YES.

Is Facebook hard? No.

Is Facebook effective? Yes (if you work at it)

Can you generate leads off Facebook? Yes, over time

Facebook is still the #1 social media platform and #2 most visited platform (behind YouTube).

**GO TO WHERE YOUR CLIENTS &
PROSPECTS ALREADY ARE!**

FACEBOOK TIPS

Get your Facebook Page Up & Running

It is no longer should you have a Facebook page; it is how active your Facebook page is performing.

If you don't have one already, Facebook will walk you through the steps! [CLICK HERE](#)

Build your Facebook following now!

It can take several months to start to gain traction on Facebook. If you start early in the year, the closer you get to AEP, the more influence you will have on Facebook!

Friend Other Professionals

Keep in contact with other professionals (P&C agents, financial planners, etc.) and share their content. This will give you additional content and the other professionals will hopefully reciprocate the share!

Use Video

Facebook's algorithms give posts with video preferential treatment over other posts because they generate more interaction. Make your own videos or share other video content on your Facebook page.

Content

Get content through Senior Marketing Specialists in our SMS Agent Connect group. [CLICK HERE](#) to join.

NOTE: You must have an active contract with Senior Marketing Specialists for access.



Join this group!





CRM

Client Relationship Manager (or Customer Relationship Manager) is basically an electronic database of your clients and prospects.

Organizing your clients and prospects in order to create marketing messages that resonate with them means you have to have a system in place that can provide that data in a seamless process.

If there is a change in your market, such as a large rate increase or a carrier is leaving the area, how do you let your clients and prospects know? If you contract with a new cancer plan, how do you let your clients and prospects know who have a concern with cancer?

A CRM can do all this for you and more!

CRM TIPS

If you are using paper...STOP
NOW!

Start with a basic spreadsheet of your clients and prospects. If you are not sure what CRM to use, at least you have a way to input your clients and prospects into a program easily now.

Which one to use?

We (Senior Marketing Specialist and the Medicare Café) do not endorse any CRM company. However, when we talk to our agents, these are the top three we hear about:

Less Annoying CRM -

<https://www.lessannoyingcrm.com/>

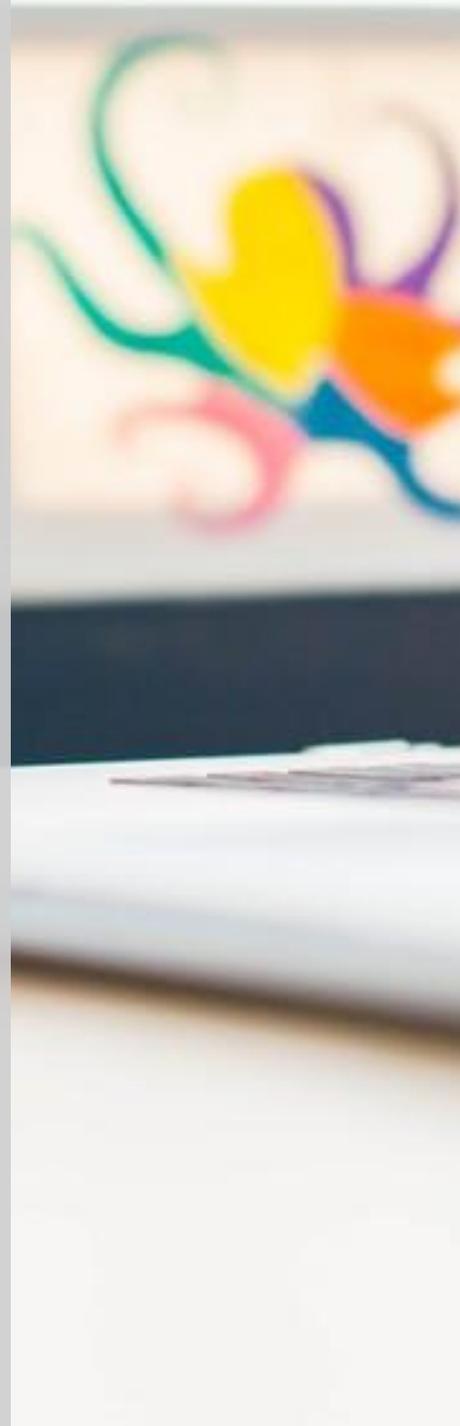
Agency Bloc - <https://www.agencybloc.com/>

Radius BOB - <https://www.radiusbob.com/>

We recommend looking at the these three and deciding which ones would suit your needs. What is right for one agent or agency may not have all the features for another.

TIP: Garbage in = Garbage Out

Your CRM will only be as useful as you make it. The more time and information you put in your CRM, the more useful it will be. You cannot expect to put minimal effort into a CRM and expect maximum results.





Should you be using eApps? YES!

Eapps can help you:

- Avoid simple errors
- Save time after the appointment (no faxing or scanning)
- Prevent pending applications

Equipment

We suggest using an iPad (regular size, not a mini) as they are generally more supported than other form of technology. Plus, you can use either an app or the carrier website, can get data from cell phone carriers so you are dependent on Wifi, and very portable.

Not sure how to get started? Give Senior Marketing Specialists a call and we will review your contracts, what eApps are available, help you get your iPad set up and start helping you streamline your process!



Email has been a standard form of communication for years. Prospects who are coming out of the workforce and into retirement are probably accustomed to using email.

A great email is one that is easy to read and has a clear call to action. If it looks like a lot of work to read, most people will just move on.

Write Better Emails

2 sentences long, a call to action, and a simple signature. That is what a great email looks like.

The more you put in the email, the less people may read, and the call to action could be lost. Keep it simple and keep it successful.

EMAIL TIPS

Your Signature

Keep it simple:

- Name
- Title
- Phone
- Website

Add an image or headshot to make it more lively

Newsletter

You should be sending out an email newsletter at least quarterly. This can be done for free through MailChimp (up to 2,000 email address). [CLICK HERE](#) to get a free account on MailChimp.

Content for Your Newsletter

Senior Marketing Specialists has our Agent Marketing Program (AMP) that will provide a quarterly newsletter for you.

[CLICK HERE](#) to check out our AMP program and get started today!

Answer in a Timely Manor

Make sure when a client or prospect emails you, you reply in a timely manor. What is a good time? Usually within 24 hours of when they emailed you!

RESOURCES

Here are some additional resources to help you expand your digital media and presence:

Pictures / Images

Do not just grab images off the internet. Some may be subject to copywrite and can result in fines for use without purchase. Here are a couple of sites that offer images free to use:

[Pixabay](#)

[Pexels](#)

Logo

You are a brand, whether you are a one-person operation or a multilocation agency. A logo can help you bring your brand to the public with a clear cohesive message. They are easier than ever to get from Fiverr. Work with a freelance artist today! [CLICK HERE](#)

Senior Marketing Specialists Resources

[Quote Engine](#) – Generate quotes and more

[AMP](#) – Agent Marketing Portfolio

[Websites](#) – Let us build your next site

[Medicare Café](#) – Join us weekly for more





SENIOR MARKETING
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**Helping you get online
and top of mind**

It's not just about being online, it is about being on your client's and prospect's mind.

If you need help with any of these methods or anything else, we are here for you!

Support Staff

Helping you with application issues, commission concerns, and more

Contracting

It's not just about getting more contracts; it is about maximizing the contracts you have

Marketing

Both on and offline, we have marketing tools and methods to get you in front of more people

Sales

Tips and ideas on how to increase your closing ratio

And more....



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