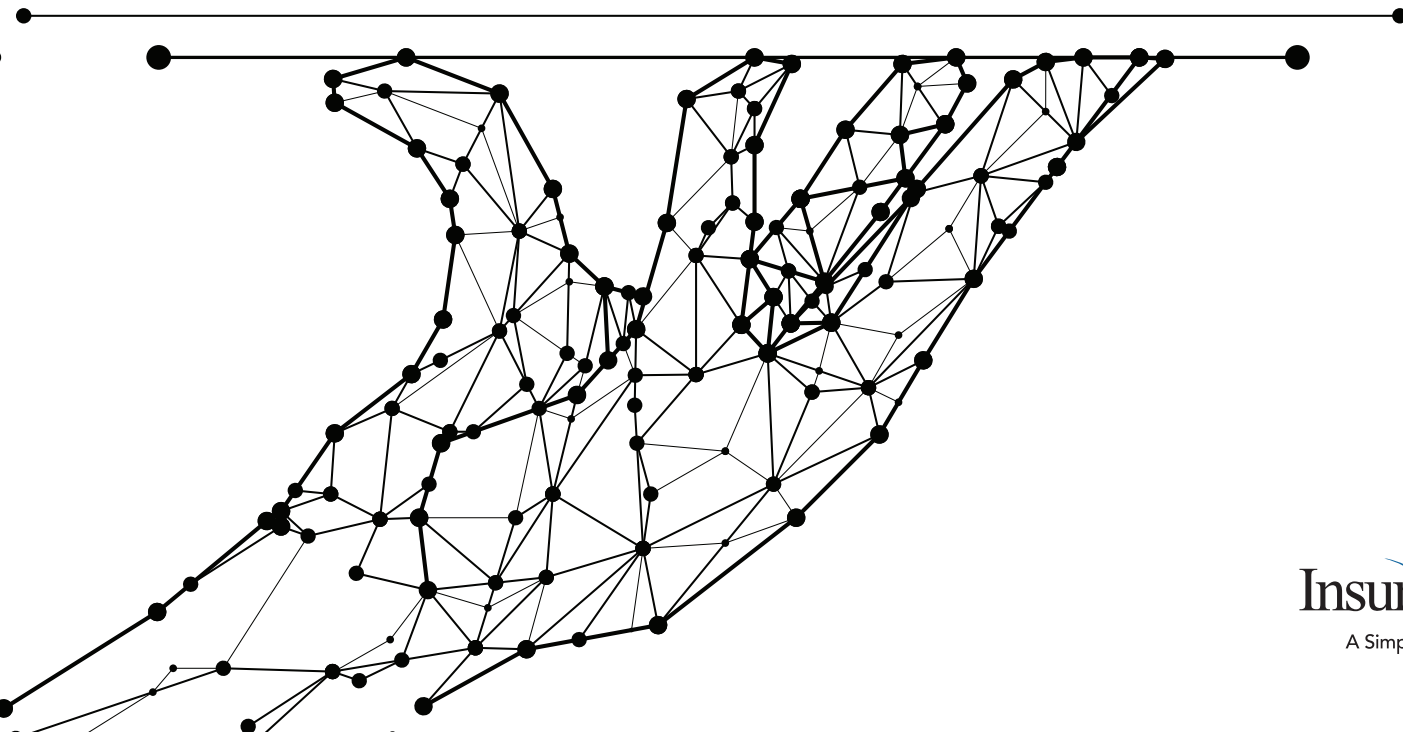
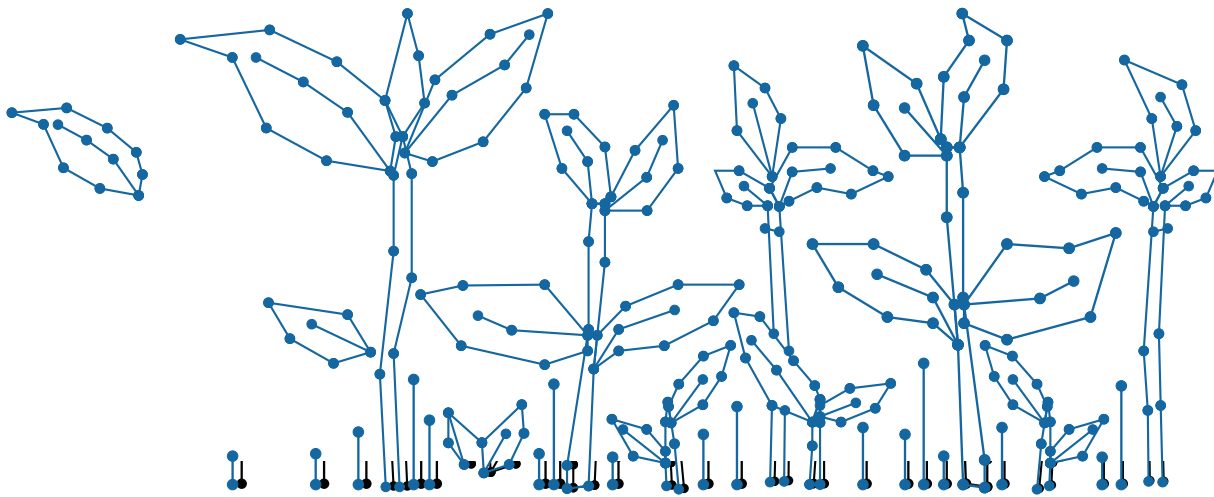


Your Customer List Is Your Best Asset

How to refine, segment and nurture your list
to maximize marketing ROI



71%

“Seventy-one percent of consumers expect companies to deliver personalized interactions. And seventy-six percent get frustrated when this doesn’t happen.”

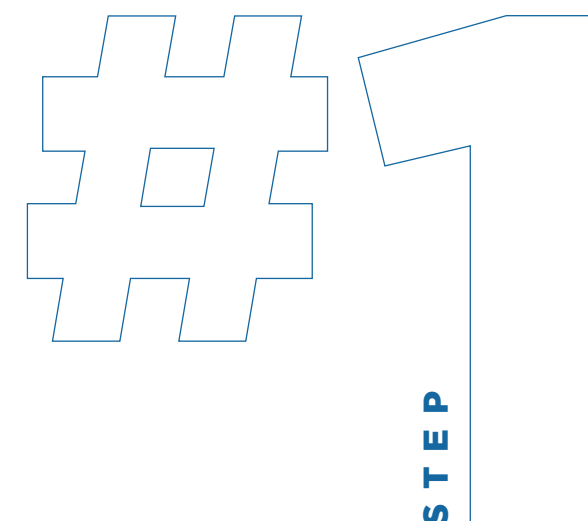
— McKinsey and Company

YOUR CUSTOMER LIST IS GOLDEN But it needs TLC to help your business grow

A customer list is like an orchard. It grows over time, and the more you nurture it, the more fruit it bears. Like different tree varieties, customers need to be nurtured in different ways depending on various factors (stage of life, financial goals, fears, pain points, etc.).

A one-size-fits-all approach doesn’t work for all tree species, and it doesn’t work for all customers on your list either. In order for your list to bear fruit, make it a priority to segment the list and create a plan to deliver relevant and timely content for each step of the customer’s journey.

By the way, this juice IS worth the squeeze. In fact, this approach to lead gen is a key differentiator between slow growth and hypergrowth firms, with **over 30% of revenue growth** experienced by the firms that apply it.



“Build trust and earn attention.
The entity that gets the most
trust will get the most customers.”

Seth Godin
ENTREPRENEUR,
BEST-SELLING AUTHOR,
SPEAKER



HOW TO MAKE THE MOST OF YOUR LIST AND MAXIMIZE ROI

Segment your list

According to Hubspot, targeted and segmented lead nurturing emails have a significantly higher click-through rate (8%) than general email sends (3%). In addition, relevant emails drive 18X more revenue than broadcast emails. WOW!

If you’ve never segmented your customer list previously, this step will take time, but it’s well worth the effort. Important segments to focus on include:

Separate clients and prospects into two buckets, and drill down from there.

- Clients
- Prospects

Segment those lists into meaningful customer personas.

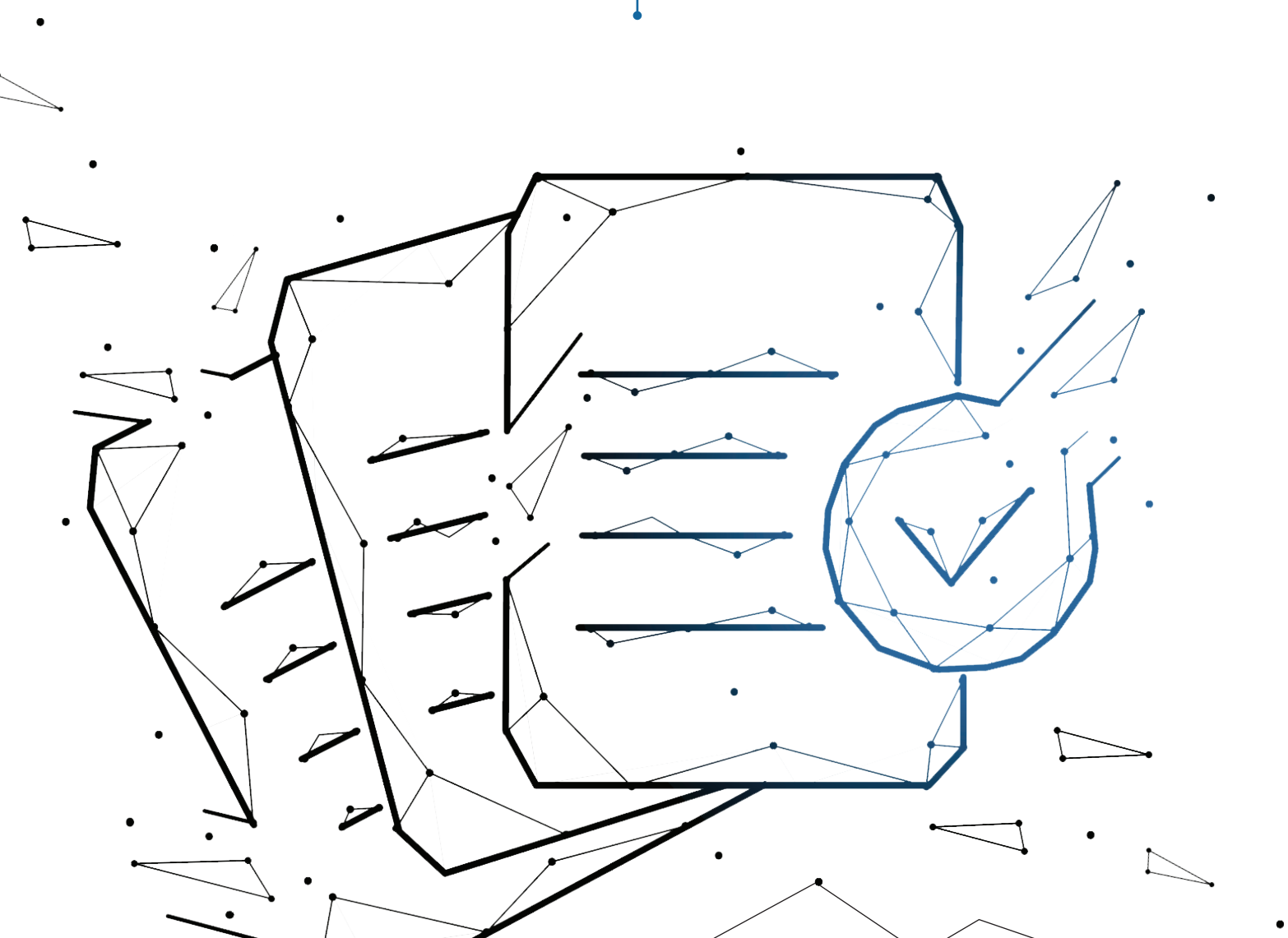
Personas should be based on the problems and challenges that keep customers up at night. While demographics are important (for example, milestones can trigger certain communications), two affluent, 55-year-old, divorced males who are successful entrepreneurs could (and likely do) have very different nagging concerns. Customers care more about how you’re going to address their pain points, so focus on that.

- Retirement Savings
- Taxes
- Inflation
- Social Security
- Legacy Planning
- Healthcare

Segment lists based on an A, B, C, D priority.

Your A-list includes highest potential ROI clients, based on time required to invest in the relationship and potential return. The D-list includes customers at the other end of the spectrum, lower lifetime value, more labor intensive.

- A
- B
- C
- D



Segment lists based on stages of the customer journey.

This helps ensure you provide relevant content and tools that suit the stage customers are currently going through.

- Awareness
- Consideration
- Decision
- Retention
- Loyalty

Segment lists based on urgency.

How “warm” is your relationship? When did the customer reach out to you last and why? How soon do they need to take action? Use this insight to determine whether a lead is hot, warm or cold.

- Hot
- Warm
- Cold

RESOURCES



Blogs



Podcasts



Webinars/Seminars



Video



Automation



Events



Websites



Lead Magnets

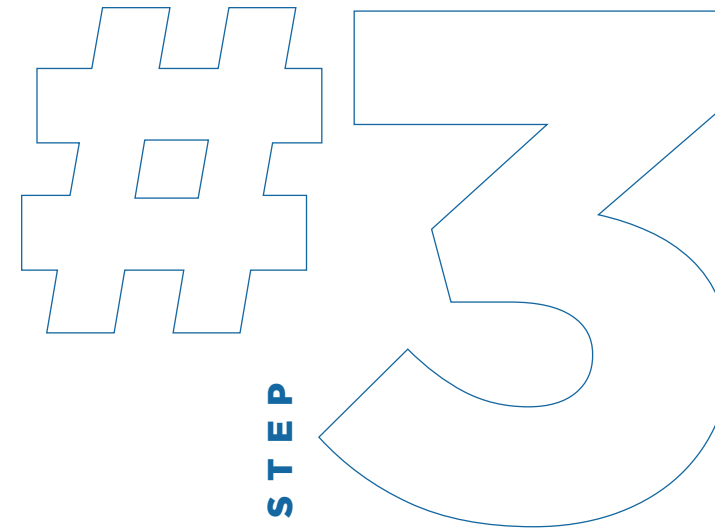


Paid and Organic Social Media



Be intentional about the resources you share

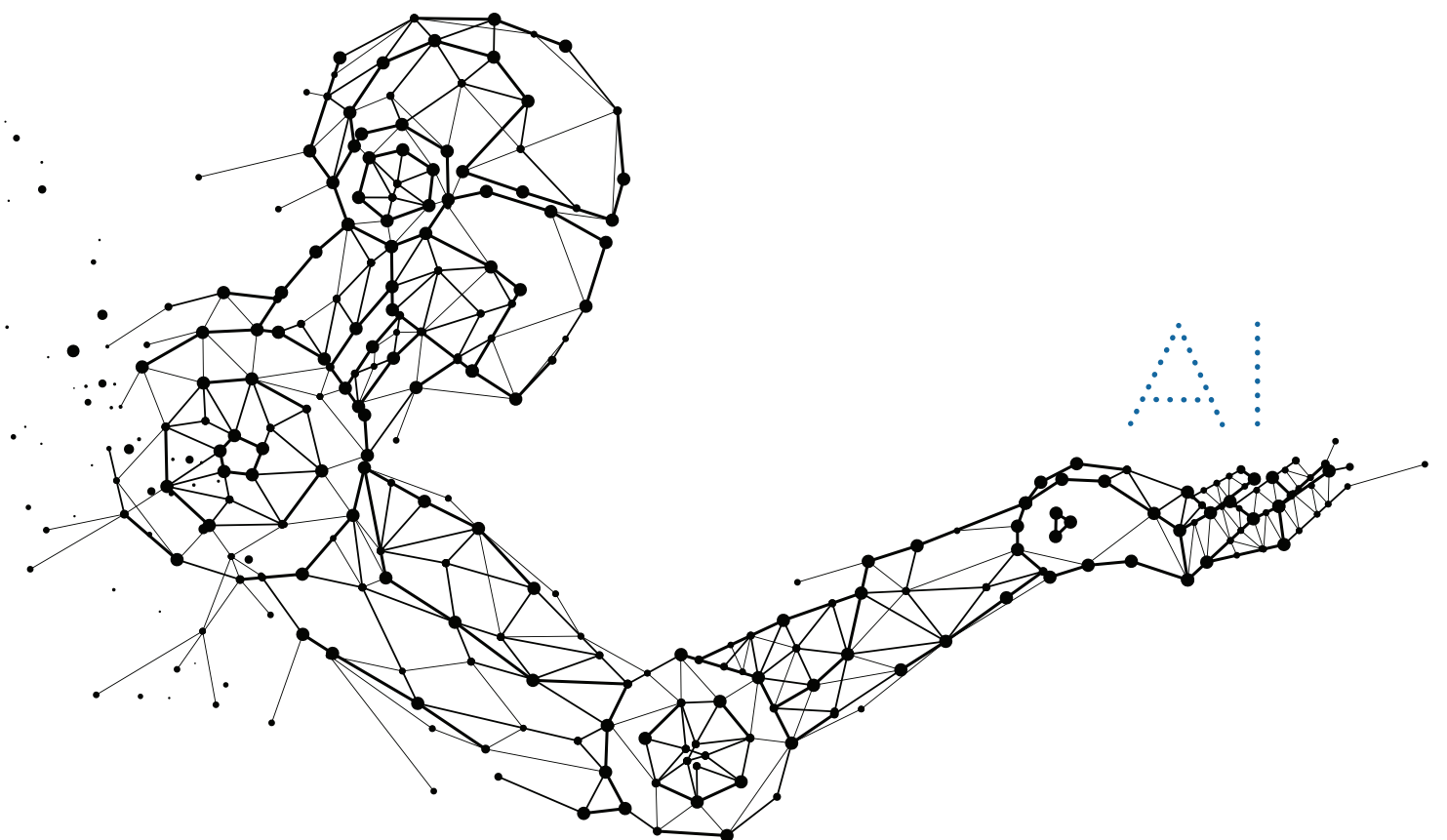
People do business with people they trust. You build trust by providing value with every interaction, so it's critical to share the right information at the right time. It must be relevant to the customer's pain points and align with where they're at in the customer journey. Creating content takes time and a plan. InsurMark's digital marketing platform **Catalyst** makes content creation easy, with award-winning, customizable content powered by AI.



Tap into fintech and marketing experts to streamline the process

It's critical to use a CRM system to track and manage customers' journeys. With **Catalyst**, you get a full-blown, digital backbone to manage client communication, lead generation and prospect nurturing via campaigns, lead magnets and a website. Catalyst leverages web, email, social and video content across all channels to connect with targeted audiences. Not sure where to begin? A marketing consultant can recommend a marketing plan and tools to streamline your business.

“Advisors who have a defined marketing strategy added an average of **41 NEW CLIENTS** in a recent 12-month period, compared to 17 new clients for advisors without one, according to a recent Broadridge survey.”





VALUE ENGINEERING

We help ambitious advisors build more successful and sustainable 21st-century businesses.

We'd like to build one for you.

Take your business (and your life) to new heights with InsurMark

InsurMark can help you make the most of your customer list and maximize ROI. As an Advisor Development Organization, we provide industry-best products, technology, training and other resources to top echelon advisors who are serious about optimizing their businesses. It all starts with our exclusive, five-stage Value Engineering Process:

- STAGE 1:** Discovery
- STAGE 2:** Analysis
- STAGE 3:** Blueprinting
- STAGE 4:** Implementing
- STAGE 5:** Refining

Advisors work hand-in-hand with an InsurMark Advisor Development Consultant every step of the way. Our Value Engineering Process is a proven process that is ideal for advisors who want MORE ...

- MORE** Client Time
- MORE** Family Time
- MORE** Business Value

Schedule a discovery call today!



Initiate your strategy discussion now!

Call 800.752.0207

Schedule Online www.insurmark.net/contact

As an ADO - Advisor Development Organization™, InsurMark provides solutions to meet the ever-evolving needs of financial professionals with a mission to protect and enhance the financial security of every home in America.