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PRO-to-PRO 2011 Day One: From Bathrobe to Bandstand

When Chester Butler opened the AIMS Society's first session in his bathrobe, one might have thought there was nowhere to go but up. You'd be wrong: Chester's presentation was top-notch. And the rest of the sessions followed suit.

This year, AIMS Society changed the structure of its annual PRO-to-PRO Executive Retreat. We met in conjunction with AUGIE (ACORD-Users Group Information Exchange), a group of agency management system users group leaders and affiliated partners, and ACT (Agents Council for Technology), an IIABA-sponsored group of carriers, vendors and agency/broker reps. Both organizations work to drive greater efficiencies throughout the independent agency system.

The joint meeting started with lunch on Thursday, which featured the AIMS Society's Annual Meeting of Members and the CPIA designation Conferment ceremony. But before the public meeting began, we hosted a half-day "Train the Trainer" session for sponsors/instructors from around the country. Chester—first in his robe, then in the suit we're more accustomed to—shared a wealth of ideas for preparing and presenting our Insurance Success Seminars. (Lest you worry, the robe attire had to do with being prepared.) He was followed by other instructors, who shared their experiences and highlights of the various seminars.

At lunch, Carl Hackling, president of Zurich Small Business, provided our Keynote presentation on strong agency-company relationships. He addressed the dynamics of partnerships and how they're changing; what agents look for in companies; and what carriers look for in agency partners. He closed his presentation with what he calls the "secret weapon" of good partnerships: book transfers. "If you want to endear yourself to a carrier," he said, "look at your stable of companies and your book of business. Ask a company to take a look at a book of business for transfer."



In the photo, Jim Gosselink (right) AIMS Society President presented the AIMS Society President's Award to **Curt Pearsall**.

During the luncheon, AIMS Society presented three awards: The AIMS Society President's Award to Curt Pearsall; Commercial Lines Company Partner of the Year Award to Zurich Small Business; Personal Lines Company Partner of the Year Award to Travelers Insurance. This year's class of nearly 400 new CPIA designees was recognized; a number of new designees made it to Tampa to receive their diploma in person!

Jim Gosselink (middle) AIMS Society President and AIMS Society Board Member Phil Bogle presented the Personal Lines Company Partner of the Year Award to **Martin Taylor** of **Travelers Insurance Company**.



Jim Gosselink (left) AIMS Society President along with Board Member Mike Grace (right) recognized new CPIA Designees present for the Conferment: **Steven R. Thompson**, CPIA of Thompson Insurance in New Lexington, OH (left) **Karla C. Ritter** of Milton Ritter Insurance in Newburgh, NY (middle) and **Bruce A. Graham** of Spectrum Insurance Agency in Rockford, IL (right).



Jim Gosselink (right) AIMS Society President presented the Commercial Lines Company Partner of the Year Award to **Zurich Small Business** President **Carl Hackling** (left) and Field Executive **Patti Davidson** (middle) along with AIMS Society Board Member Rick Dygve.

A brief AIMS Society progress report was shared, as well. Highlights include strong membership and programs growth. Assets are up, new memberships are up, retention is strong, state expansion and program fees are up, and total income increased by more than 20%. The CPIA program continues to grow; more than 120 programs were held in 2010, up from 86 the year before. Nine new sponsors came on board in 2010; courses are approved for CE credit in 42 states. All in all, AIMS Society is doing very well in a challenging economy. That's a real testament to volunteers and other supporters who recognize that marketing, sales and professional development are important, especially when times are tough.

The afternoon featured a panel discussion on social media and electronic marketing. Key takeaways include:

- Social media can level the playing field for any size agency.
- Successful deployment requires a plan, but only about 15 minutes a day of work.
- Tools exist to monitor and measure results; best of all, many of these are free.
- Social media is reaching people of all age groups—not just younger people.
- Collecting email addresses is important in development of digital marketing programs.
- Integrated account-rounding campaigns work; one agency wrote more than 75 new personal umbrellas via client emails and staff focus.
- It's important in social media to talk about what clients/prospects want to hear, not what you like about your agency.
- Email campaigns generate response; one agency sent 3,000 emails out and received 80 phone calls in less than a minute and 200 emails in 30 seconds.
- It's important to know why you're in social media and to address E&O issues early on.
- Let a guide be your guide; create and enforce a guide to social media use within the agency.
- Facebook targeted advertising can be a very cost-effective way of reaching prospects.

A second panel presentation focused on niche marketing. Ideas from that session include:

- In addition to a marketing- and sales-focused web presence, agents can serve niches well by offering 24-hour service portals and mobile claims portals.
- Web-based marketing for niches (or any prospect, for that matter) should include a clear call to action.
- To manage an entirely web-based niche marketing program, one agent uses a technical support-like ticketing system to monitor workflows.
- Niche marketing generally requires passion for the niche.
- Offering a free report or other takeaway is a good way to engage site visitors and gather email addresses.

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- Auto-responders can manage much of the initial communication with prospects.
- Current technology allows niche marketers to eliminate or reduce redundant data entry along the insurance supply chain.
- No matter how small a niche may seem to be, agents can succeed if they identify a need and tailor their products and services to meet it.
- Having an FAQ section on the site serves visitors and helps attract search engine attention.
- Telemarketing and inbound marketing can combine to help agents succeed in niche marketing.
- In the instant-response online world, visitors expect immediate contact when they request information.

The afternoon session ended with a presentation on hiring for sales. Look for information written by the presenter in an upcoming AIMS Society *Bright Ideas*. A key point made during the presentation had to do with sale- versus service-inclined staff. Asking a service-minded person to handle a prospect call may be daunting. But tapping that individual's desire to help and serve—and explaining to the service professional that the prospect really just “needs help” and “has some questions” about a product—can make the interaction much easier.

The first day's events ended with the AIMS Society dinner, followed by a Flamenco dance presentation by local entertainers and the debut of a new band, **JoKeR**, a group of insurance professionals—Jerry Fox, (left) of Marshall Swift Boech, our own Kitty Ambers, (center) and Ron Berg, (right) from MetLife—covering a broad mix of crowd-pleasing familiar tunes.



**Mark your Calendar for the
25th Annual PRO-to-PRO
February 16 – 18, 2012
We're in the process of finding a fun,
warm weather locale.**