



Sample Marketing & Sales Program//Annual New Business Marketing Plan

Our intention is to give you an example of the type of planning and activity that you'll need in order to reach your annual revenue goals. Obviously, you may need to adjust some of the numbers from this example, but this gives you a starting point.

This is very similar to what \$1+ Million commission producers do with their weekly prospecting and planning. They stay focused!

What you'll need to do in order to succeed:

➤ **Update Your Online Profile:** Your prospects are looking for integrity in your representation of your company and its people. With a few clicks, prospects can view your LinkedIn profile, your social media posts and images, the company's website, customer evaluations, key executive profiles, and employees' personal lives. Most executives will complete an online search of you, the salesperson, and prior to the meeting. Make sure you look your best and your bio and experience is concise and up-to-date.

➤ **Be Quiet & Listen:** How many times have you noticed salespeople talking themselves right out of a sale? When other people talk too much, we notice immediately. When we talk too much, everyone else notices.

While long discussions can enhance relationships, most customers prefer salespeople who are to the point. Here are the top factors that keep sales reps from listening more than they speak:

Avoid Anxiety. People who are anxious use an avalanche of words to avoid dealing with potential conflict (such as a prospect saying no). Instead of balancing talking with listening, they believe that their wall of words will protect them from what they imagine as a threat. They often refuse to give up control of the conversation, adding a trail of words that echo the ones they've already expressed. If you're in a coaching situation, don't talk about what was said; instead, talk about the salesperson's feelings.



Be prepared. The less clear we are on any given subject, the more words we need to talk about the subject. Here is an eye-opening exercise: Ask a salesperson to make a presentation about your company as if you were a new prospect. Time the presentation. Next, ask the salesperson to write a concise description of your company on one page. Now read the copy at normal speed. How much time did it take? Much less. The lesson? Lack of preparation stretches the presentation.

Stress. When we are tired, we tend to ramble, and our ability to concentrate begins to decrease. Our brain responds to mental fatigue by producing more words and less meaning. The cure: Get enough sleep, eat healthful foods, and exercise regularly.

Lack of a road map. Follow the sales Process at Granite – which is your Road Map, which includes:

- What is the call objective?
- What information do you need to get?
- What information do you plan to give?
- Talk less and listen more.

Failure to budget for time. Some reps get so involved in conversations that they lose track of time. Budget a specific amount of time for each call and stick to it. If you are a manager and want to save time, conduct your meeting standing up. This forces people to get to the point. If you meet with long-winded people, remind them five minutes before you plan to leave by saying, "We have another five minutes; what else do we need to cover?"

Lack of humility. Some people think that everything they say is important. When they talk, they experience a rush of good feelings, and they often fall in love with their own words. They may use catchphrases and complex language to impress customers. Don't be a "talkaholic." Stop lecturing. Turn your liability into an asset. Learn from others. Being expressive is nice; however, good relationships require us to be receptive to others.

Ineffective thinking. While some salespeople continue to hopscotch from problem to problem, others quickly get to the core of a customer's problem, solve it, and close the sale. How? They use two types of thought patterns that can cure "wordaholism": convergent thinking and divergent thinking. While convergent thinking leads to a focal point in the middle of a circle, divergent thinking radiates away from the center in every direction. Divergent thinking opens people's minds; it leads to new ideas, thoughts, and possibilities. As a result, the conversation goes on and on. Convergent thinking leads to conclusions and concrete results.



- **Be the Expert:** Be an expert in your subject matter and niche, and use your entire team (operations, technology, coverage experts) throughout your sales process if you want to connect to your buyer's team.
- **Offer Future insights:** You must bring the future to your customers. Your value is seen in your ability to predict the impact of market information on your customer's business. Prediction feels risky, but you can use your experience to project a trajectory of possibilities. Data is easy, but insight requires experience and is, therefore, a more valuable resource.
- **Get to the Decision Maker:** There is a sales truth – "You get sent to whom you sound like." Having spoken to more than 5,000 CEOs, a consistent complaint regarding sales has been, "Our salespeople cannot get to the real decision maker. It seems like only the senior executives can make the decisions anymore."

The buying processes have changed. Small purchases are made through the purchasing or procurement departments; large purchases require a senior executive's sponsorship. However, to get the time and attention of these senior executives, you need to bring your senior executives to the table. Because real resources are being invested, this establishes that your company is committed to the relationship. It also establishes for the buying company that decisions can be made in the meeting. It is hard to get senior executives to come to a meeting when only a salesperson is going to be there. If you really want to win a deal, be prepared to invest in a new resource – senior executive time.

- **Value Your Time, Your Teams Time:** It is a frustrating thing to accept, but it is true – you can make more money, but you can't make more time. Time is finite, which is why it is precious; This is especially true in the sales process, where a lengthening buying process over the past few years has also lengthened the sales process. Over 50% of companies reported that the sales process has lengthened. As a result, we have to make shifts in the sales process to adapt.

Time has stretched out in the decision and execution cycle, with the delays taking many forms. Procurement has to get involved even when you have an early yes. Getting senior approval may be harder, or impossible. While you can't create more hours in the day, you'll need to prepare for the time necessary to invest in deals. This is why the qualifying process is so important to your sales process – which is the DAQ at Granite. You'll eliminate the prospects that are only there to steal your time and never have intentions to give you the business.



MARKETING FOCUS: Where to Start

1. Identify the top 10 communities you desire new accounts.
2. Identify 10 accounts in each community
3. See if you can make a referral from a current client into one of these businesses, or maybe you already have them
4. Target your communications to those communities in priority order
5. Visit those communities after mailing and invest the time to spend a day or two. You'll quickly identify anyone you may have missed and eliminate those that don't qualify.
6. Schedule face-to-face meetings with the ones you feel good about and begin the sales process by completing the Diagnostics Appointment (DAQ) Questionnaire.
7. Don't be afraid to cold call an account while in a community, drop off something of value (great article, resource, etc.)

Referral Network/Power Partners:

Many successful producers have a formal Referral Network/Power Partner Program. Identify five influential people in your community (or niche industry if you are working one) that will be willing to meet with you, critique your efforts and assist in your personal growth and professional development. Have them share their success stories and give you advice on your career. Build a strong rapport and make sure they are comfortable serving as a referral for you. Every year identify five new mentors and complete the process again. In ten years you'll have a strong influential group of friends and clients. Successful people love to tell their story so don't be afraid to ask. Meet with them several times a year, share your goals and have them hold you accountable. Take them to coffee; invite them to one of our Compliance Workshops, tag-along with them during one of their client visits, etc. Learn from them!

Niche Marketing:

Granite has a number of special niche programs available to its sales team, with supporting prospect lists and marketing material. It's important that you identify areas of specialty with which you have a special knowledge, passion or interest.



Once you have identified a specific niche spend time volunteering and working alongside them to learn the specific business language, acronyms of the industry, attend a local association meeting and invest time becoming a specialist. It becomes very obvious very quickly you're in depth knowledge based on the questions you ask prospects. This gives you a competitive advantage. People like buying from people that understand their business.

Become an Associate Member of the local or state association, attend their meetings and conferences, and become fluent in current business issues affecting them so you can discuss and ask questions intelligently. Also become a specialist in specific coverage's available to them and the policy language affecting their coverage's. You'll set yourself apart from the typical insurance "peddler".

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Let's now outline how you'll reach your annual revenue goal.

Assumptions

- 1. Annual Revenue Target: \$180,000**
- 2. Prospect Universe: 500 Minimum, 1000 is better**

Set Your Weekly Schedule: Below is Granite's recommended schedule for success.

Monday Morning:

Review and analyze your Marketing & Sales Plan from the last week, System work, administrative work, reports, and select markets to work with for new business, confirm appointments for the week, follow up on any company submissions, sales meeting every other week, etc.

Monday Afternoon:

Phone calls 20-25 to new prospects, create and send marketing content via HubSpot (through HR)

Tuesday-Wednesday-Thursday:

Tuesday morning, phone calls 20-25 new prospects. Set appointments for initial introductions, presentation, and follow ups. Stay in the field three days a week.

Friday morning:

20-25 phone calls to new prospects

Friday Afternoon:

Supplemental mailings (minimum 20 pieces), admin work, meet with a/m, discuss markets, reports for the week, other agency business.



Monday – Friday:

Sales people with clients: You'll be working your renewal appointments as need, by your clients and account management team.

The goal is to have a set weekly structure and follow it. You'll need to make sure you're out meeting 25+ new people a week and that you are e-mailing at least 20 introductory pieces, requesting e-introductions, and sending out your niche marketing/content marketing via HS every week.

Meeting the Prospect Process

At Granite, we require that you follow our **five-step** process:

Step One: Pre-meeting planning - Do your Internet research! Your prospects website, Google, News, LinkedIn, anything you can find. Confirm your Introductory meeting via e-mail.

Step Two: Introductory meeting and build report, complete the DAQ, ask Probing Questions, overview of Granite Services @ the end. 80% listening, 20% you're talking. Before leaving, schedule your next meeting to present your Executive Summary. *(But only if you both agree that you should move forward together – 75% of your intro meetings will be walk a ways)*. If proceeding, when you get back to the office, send a follow up e-mail thanking them for their time, and that you'll see them on xx/xx/xx, confirming your follow up meeting to present your solutions.

Step Three: Second Meeting - Executive Summary is Presented. You'll present all of the solutions that you uncovered from step two above. You'll introduces new ideas to solve issues, make recommendations, and then offer services available depending on the type, size of account, and their needs. You might schedule a software demo or bring out your counter-part at this time. You can send your pre-meeting reminder e-mail the day before.

Step Four: Third Meeting – The close. Close the account, collect what you need, do what needs to be done.

Step Five: Meet your Team Meeting – At this meeting, within the first 30 days of placing the account, you'll bring their account management team to introduce them, review roles, etc.



Example of how many prospects and meetings that you'll need in order to meet your annual revenue goal, based on The Dynamics of Sales National information:

SAMPLE PLAN TO ACHIEVE ANNUAL REVENUE GOAL - \$180,000.00

1,000 prospects in my database with x-dates

400 face to face meetings (40%)

100 presentations (convert 25% first appointments)

Walk-a- ways are 75%

60 new accounts close ratio (Dynamics of Selling Close Ratio is 75%, National Average is 30%)

\$3000 average commission per account (This is an estimate, adjust based on your average revenue per sale)

\$180,000 new business commission

\$1,500,000 in new premiums to carriers

Then, when applicable, add your renewal commissions (Retention, 90% National Average)

= \$_____ Annual income

MOST agencies/producers/sales people miss their annual goals because they don't track their progress and stay focused on the activity they need to make their goals a reality. You'll always track your weekly activity.

MOST agencies/producers/sales people quote and market accounts that were never correctly qualified, frustrating their marketing team and underwriters. They skipped the DAQ process. You'll always follow the DAQ process.

WEEKLY Activity Goals:

The agency has 1000's of qualified prospects on various lists we've purchased, based on our parameters. The agency will purchase new lists, as needed. The average database changes at about a 20% rate per year so we are assuming there are at least 1,200 viable prospects in the region to work on. Based on 1,000 x-dates we can assume the following.



In order to get 400 face to face meetings we need to:

2. Assume we have 46 working weeks to do so in a year
3. Mail 500 pieces of mail/drop offs annually (Producer personally mails/drops these)
4. 20 pieces a week of introductory e-mails and/or letter (follow up call on each)
5. 50 phone calls/personal visits to prospects a week
6. 15-20 interactive meaningful fact gathering face-to-face meetings a week, from the 50 phone calls to build rapport and identify pains and needs from the questionnaire (DAQ) and probing questions
7. 4 new Executive Presentations from those 20 face-to-face interviews
8. 60 new accounts annually (REMEMBER, if your average commission per account is different, you have to change all the other numbers in order to make your goal)
9. The Goal Setting Worksheet is to help you identify these numbers

Your Weekly Call/Activity Reports:

These are required and necessary to track your desired activity and your results for you and Granite. Top sales people measure their activity. A sample call report is included in this material.

Sample Telemarketing Script or Marketing Letter

Your Big Fat Claim:

Granite Script

Hi this is ____ from ____ Granite Insurance or Curated Compliance or Granite HealthPro. The reason I'm calling you today is _____. We have a (or several) unique insurance program(s) for your business and several carriers interested in looking at your account. May we have 20 minutes to introduce our agency and our program to give your company a competitive advantage in the current economic climate?

If applicable, - I'm following up on the e-mail

The benefits of our unique program are:

- Our agency works with over 300 insurance companies, with over \$400 million nationally in P and C business, giving us clout – which gives you clout. (P and C Only)



- Our Programs to Promote: Pay as You Go Workers' Compensation, Granite HR, CompSolutions, Granite HealthPro, Curated Compliance
- We have access to industry specific expertise that a company like yours needs
- We can bring that expertise to you locally

Not everyone qualifies for our program; my job is to see if we have an opportunity to work together.

We would like to talk with you within the next few weeks - do you have 20 minutes that I could take to introduce our program and leave some brief information?

The goal is to get in front of the prospect and interview them using the DAQ Questionnaire & Probing Questions.

The Presentation of Solutions/Executive Summary is done ONLY after you have identified problems, pains, and done the income calculator at which point we sell directly to their issues and personalize the presentation.

Remember, you can never solve a problem you did not identify during the fact finding or you focus your buyer only on the price.

What is Hubspot?

Hubspot, supported and paid for by Granite, is an inbound marketing and sales software that helps you attract clients, convert leads and close customers. You'll create content, optimize it for SEO and share it on social media, all in one action. You'll engage and track prospects with landing pages, calls to action, personalized e-mail. You pay attention to your analytics of every post and communication, so you know what works and what doesn't. You'll be able to directly communicate industry specific information to your industry specific lists.

How To Get Started With Hubspot:

In order to have access to Hubspot, you'll need to go through the [Hubspot Academy Certificate Program](#) first. The course will require about 10 hours of your time, but its well worth the price of admission.



Buying Prospect Lists:

Many agencies don't ever purchase a list. We have and do. That is why the majority of the agencies we compete with remain in the adolescent stage of their business development over a career. Having an unlimited number of prospects and pre-qualifying them is crucial to having a healthy agency. You need at least 1,000 prospects. You should also research to what's available under our many association affiliations. There are 14 different organizations to select from and work within.

Budgeting:

There is no doubt that growing book of business costs time and money. The time to understand what it takes is now, not when your half way through the year and out of money. Do your planning and remember to include travel, education, costs to upgrade your LinkedIn account, costs associated with networking and learning time. Set a specific amount of money aside for your growth efforts. Agencies seldom grow by accident.

Formalize Your Business Plan:

Think, plan, then put it on paper. Figure out what and how you're going to make your goals now, rather than ½ through your year, when it's already too late.