

## Neumann Agency - Marketing Plan: Executive Summary

### **Summary:**

The primary marketing goal for the Neumann American Family Agency is to create a service distinction both among the regional players and internal competing company agencies. This service distinction is characterized by an institutionalized focus of our “Client First” attitude. Each member of the Neumann Agency is hired and trained to go above and beyond in service to the client. This attitude is recognized among the staff who have worked for various agencies, it is reflected in the growth and retention rates for the business, and it is shown through 25 years of business development.

While in the past, the Neumann Agency has relied on the strong brand reputation that American Family provides to the buying public, we are ready for a pivot. Our future is to expeditiously use the tools provided for by American Family while focusing on a unique message point to illustrate and re-enforce this client first focus. To do so, we will exercise the values of our mission statement through our produced copy and content, and it will be reflected by a sense of ease, trust, and confidence that is inspired by our clientele.

### **Goal:**

To be acknowledged among our region as a thought leader in communicating why insurance matters for your financial security, and to build that sense of knowledge among our existing and future client book.

### **Execution:**

A three phased approach will be taken for executing this goal, wherein we are ½ way into Phase 1 and have established ¼ implementation of Phase 2.

#### *Phase 1 – Business Planning and Adoption*

By market positioning and internal assessment for best in practice strategies, we will engage in a thorough business plan overhaul to reach into the past and project into the future to align both with corporate goals and our internal key performance actions.

Drafting the plan is step one, executing is where the real work begins. Through an integrated team-based approach, we will acknowledge this plan and put it into implementation throughout the entire agency. The plan itself is malleable, but the experience is a growth strategy to better develop a cohesive and responsive framework to handle any market adjustments that arise.

A plan is most successful when reflected upon, and therefore, the final step is to establish an ongoing assessment, audit, and adjustment based upon established analytical metrics and timeframes to identify successes and weaknesses inside the framework.

#### *Phase 2 – Existing System Design*

Our information systems are comprised of three different buckets: Internal Systems, External Systems, and Operating Systems.

Our internal systems are the American Family proprietary means of communication among our staff and our clientele that are working for us right now. These systems have a varying degree of flexibility and autonomy, however all shall be better leveraged and refined to orient towards our client first approach. Items include means of channel oversight, operation, and flow. Other ways to improve our system are a more branded and focused approach to providing support throughout the client life cycle process. Internal system design is also a team building exercise where strengths, values, and growth points are identified and supported among all staff.

External Systems represent communication mediums which we do not own, but leverage, such as digital media, reputation management, and regional public forums. These mediums all operate best as a nurturing environment for lead generation and retention; therefore, our focus will be to tightly manage these systems with one narrow goal, perhaps expanded to two when successfully implemented. Strategic examples include content propagation on Facebook to better nurture our clientele into becoming future advancers and victors. When our engagements include a value exchange expression, our clients will better trust our messaging and heed our advice. Another strategic example includes utilizing the network effect provided through LinkedIn to become a sought out strategic business ally among fellow industry players such as real estate agents, mortgage lenders, business advisers, and auto sales agents.

Operating Systems design is focused on the client life cycle process leading from initial lead generation through to retargeting previous clients by bringing them back home. Our intent is to scrutinize our existing end-to-end experience meeting the client needs. Once we have mapped out the client journey, we will infuse automation, technology, and information that only aids in the process and never interferes or creates confusion among our clientele. Primarily, our internal work is to understand why, how, and when a client shall be best served by whom by leveraging our independent team members' core strengths, values, and attributes.

### *Phase 3 – Client Knowledge Expansion*

American Family Insurance's mission is: *To inspire, protect and restore your dreams. Because we believe a dream is the most valuable thing you'll ever own.* Our marketing goals are to be the number one model agent to embody this mission. This is a big goal, but we are the agency of record to take on this challenge. The information systems we create will coalesce around this mission.

These steps are how we intend to fulfill that goal:

- Nurture Campaigning – Delivering value to prospects to close the sale.
- Dream Big – Acknowledging the dreams of our clients and assist in mapping their journey.
- Sales Funnel – Building an end-to-end client first experience that is individualized as only a neighborhood agency can provide.
- Automation and Scalability – Planning an agency that can match market demands.
- Corporate Initiative – Crafting an environment for means testing and measuring big picture ideas on a local level.
- Client Relationship – Creating engagements that address the individual concerns of our clients such as market segment specific guides or one-on-one insurance reviews.

### **Charge:**

This ambitious project is overseen by Bill Neumann, managed by Elayne Neumann, and consulted upon by Drew McCullough. The project goals are to be tracked and measured for success and revisited upon periodically. Implementation of this plan is estimated to take 6 months with revision to occur each annum, and an expected execution to fulfill over two years.