

A photograph of two business professionals, a man and a woman, looking at a tablet together. The man is on the left, wearing a dark sweater over a light blue shirt. The woman is on the right, wearing a green and white plaid blazer over a white collared shirt. They are both smiling and looking at the tablet. The background is a blurred office setting. The image is overlaid with a dark blue gradient.

# Marketing Tools & Strategies 2023

By **CLARO**  
INSURANCE

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We know that insurance is not a minor responsibility; Each of your clients is a different world with different needs; For this reason, at Claro Insurance, we believe this path is easier when we walk it through in the hands of an ally. **At Claro, we are by your side so that your business, regardless of its size, always has the best options and tools within your reach.**

# Social Media

Your social media plan is a document that details all the necessary strategies and activities **to contribute to your business goals through your social networks**. To build this plan, you must answer these questions:

**What do you want to achieve?**

**Who is your target audience?**

**What is your value proposition?**

**What do you want to communicate?**

**What media channels are you going to use?**

**How can you achieve it?**

It is paramount that all your digital efforts are oriented with the media channels and the right message for your target audience; in this way, you will achieve your business goals through these channels. Social networks can help you with: brand visibility, lead generation, increasing engagement and retaining your customers.



# 4 steps to build a social media plan:



## 01 Planning:

Rule number one (1), DO NOT execute activities without planning first and thinking about the questions above. Define a business objective, audience, message and clear up your value proposition.

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## 02 Create:

Define: what do you want to communicate? Then, develop all your digital content with a communication goal. It is important to mention that not all your content should have the same objective, it is important to mention that not all your content should have the same objective. This means that you can generate graphic content that aims to make your customers consider you as the best option for their needs and, at the same time, some content that allows you to interact with them.

In this phase, you must define some topics and communication lines that you consider important for your clients and target audience, a publication calendar and the platforms on which they will be published, as well as the different formats of each one of them. You must ask yourself, where is my target audience? What social networks do they use? then, I will be able to define where your brand would be.

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## 03 Execute:

Carry out your digital activities as planned.

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## 04 Measure:

Rule number two (2) **MEASURE EVERYTHING!** In this way, you will be able to track the results of all your activities in detail, evaluate the fulfillment of your strategic goals and take corrective actions against the plan during its execution.



## Tips to keep in mind:

- Content **IS THE KING**. Do not worry about having a high frequency of publications, if the content won't be high quality for your target audience; **Focus on generating valuable content**, maintaining a minimum frequency of two posts per week.
- Make a **monthly plan** of your contents.
- Join and **monitor digital trends** if you think they might work for your target audience.
- **Identify within your target audience** the hours when they interact the most with your digital publications. Those may be your best posting hours.
- **Avoid posting on Friday afternoons, Saturdays, and Sundays**.
- Keep in mind that your social networks are another communication and sales channel; **respond to all your customers messages**, concerns and requests in the shortest time possible.
- **Create a graphic line of your brand**, to generate visual harmony and long-term recognition.
- **Use short # hashtags** that help you to generate organic reach within your target audience with topics that you talk about.

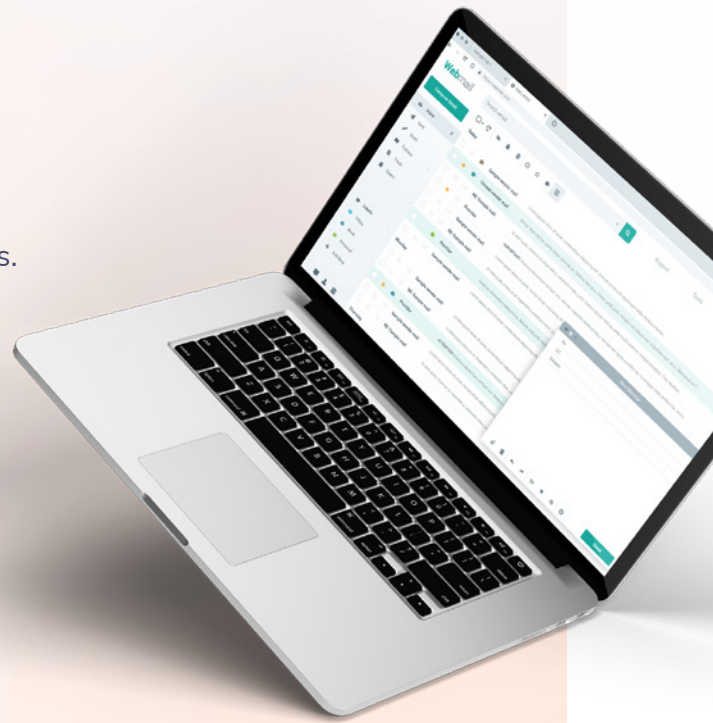


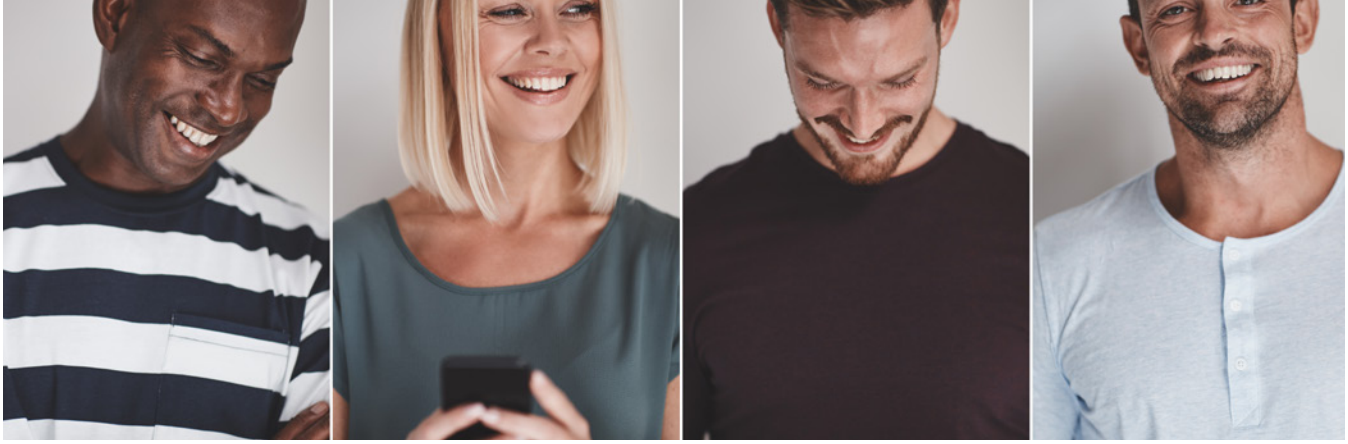
# Email Marketing

Email marketing will help you to communicate in a digital, close and personalized way with your clients or potential leads which you will be able to manage through your database. The target of these emails can vary depending on the action you want your contacts to take.

## Email marketing Benefits:

- ✉ Direct and personalize contact with your customers.
- ✉ Customer Loyalty
- ✉ Brand positioning.
- ✉ To promote and sell your products or services.
- ✉ A/B Testing will help you to discover which messages are most relevant to your customers.
- ✉ Analytics and data from all your campaigns.
- ✉ Save money and resources.





## Email Marketing Best Practices

Do you want your email marketing campaigns to be successful? Find here some email marketing tips to keep in mind before sending your email campaigns:



### Define your goal:

Before sending our email, **you must define what we want to achieve with it:** let your clients discover new benefits and/or sales discounts? breaking news? close a deal? schedule an appointment? At the same time, we recommend you end your email by inviting your clients to carry out an action that helps you meet your objective (click to accion), such as: See your benefits! Schedule an appointment! Buy now!

### Define your target audience:

One of the main advantages of email marketing is that **we you send the right message to the right person:**

- Segment your database by interests, preferences, goals, etc.
- Use a specific tone of communication to your target audience.
- Use the preferred language of your customers.
- Make sure your content is valuable, direct, and clear.

## Time and frequency:

There is no fixed formula for defining the ideal time to send your emails. This time will depend 100% on your customers behavior. However, **you can identify this behavior by carrying out (A/B) testing with some variations of times and days.** After this, you will be able to identify what is best suited for your audience and is achieving better results.

At the same time, the frequency will depend on the type of content, your customers behavior. We recommend that you can define the frequency of your content or messages with topics to vary your information so that the client does not feel saturated “always with the same information”.

## Additional tips:



### 60 characters

The email subject is key, be attractive, you only have 60 characters to make your customer fall in love with your message.



### Personalization

Customize your emails with the name of your clients, making the message familiar and close.



### Formats

Try to use different formats in the body of your email (text, gifs, images) to prevent your email from being sent to the SPAM of your customers.



### Tool

Use a specialized email marketing tool.



### Metrics

Review your metrics and set goals for % open rate, % clicks rate, % bounce.

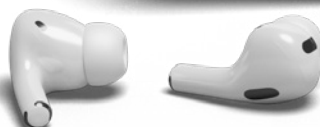
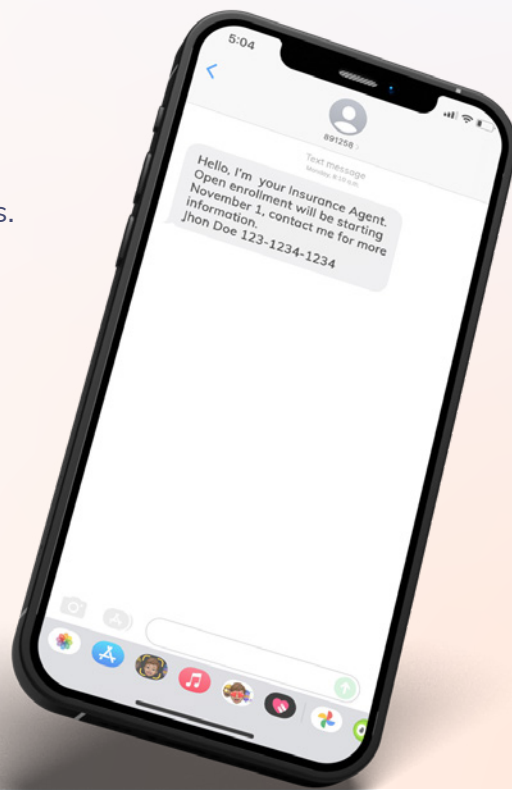


# Text Messages (SMS):

Text messaging or SMS (short message service) is a digital channel that will allow you to send short and effective messages to your contacts through mobile messaging. You will only need to have the cell phone number of your contacts. SMS is an easy to use channel and has a great impact on increasing retention, sales and improving your communications and brand loyalty.

## The benefits of using text messages in your digital campaigns

- 📧 Immediate delivery.
- 📧 Personalized and segmented shipments.
- 📧 High open rates.
- 📧 The messages do not reach the “spam” mailbox.
- 📧 Direct communication.
- 📧 Low cost.





## SMS Best practices:

- 01** Segment and clear your database, you must validate that you have the correct names and cell phone numbers.
- 02** Count the number of characters in your message, it should not be more than 160. It is important that you keep in mind that links, punctuation marks, etc., will add to the characters.
- 03** Do not use full links, make a "short link" and reduce the number of characters in your message.
- 04** As with email campaigns, define a clear and striking call to action, unless it is an informational message.
- 05** Be specific and go straight to the point.
- 06** Send personalized messages, keep in mind 10 characters for the name of your clients.
- 07** Use SMS specialized platforms and tools, they are easy and a low cost resource.

# Prints

Having a marketing campaign that integrates different digital and non-digital channels will make your profile/brand more professional and will support you in positioning and recognizing your brand. There are different ways to complement your digital marketing strategy with printed products. Here are some ideas:

## Business Cards:

Keep in mind  
these tips:

- Provide real and updated information.
- Less is more, make sure to give only the information and data necessary for contactability (name, email, cell phone and website).
- Here, the most important thing is the information, do not saturate your business card with graphic elements that can lose the attention of your potential clients.
- You can digitize your business card through a QR code (in case you do not have the printed one at your hand).  
Make it digital so you don't have to spend money on it.



# Flyers or Brochure:

Take in mind  
these tips:

- 📄 Make sure that the graphic/visual style of your prints is 100% in line with the visual identity of your brand and all the digital pieces.
- 📄 Classify the information, and give weight and relevance to what you want your customers to remember.
- 📄 Try to use simple formats and without complex folding, your customers and your pocket will thank you.
- 📄 Always create two versions: print and digital version.
- 📄 Provide relevant, clear and simple information.
- 📄 Always close the print with your contact information.



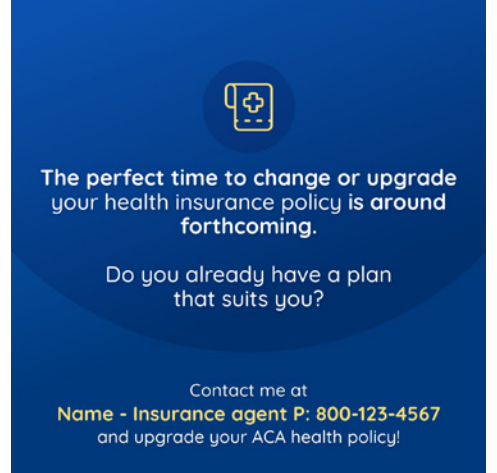


# Social Media Templates

1



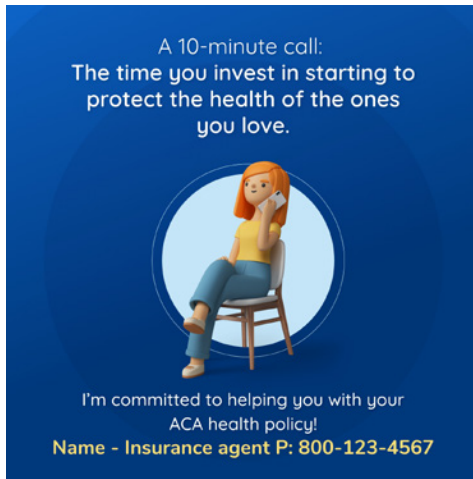
2



3



4



5



# Social Media

## Templates

1

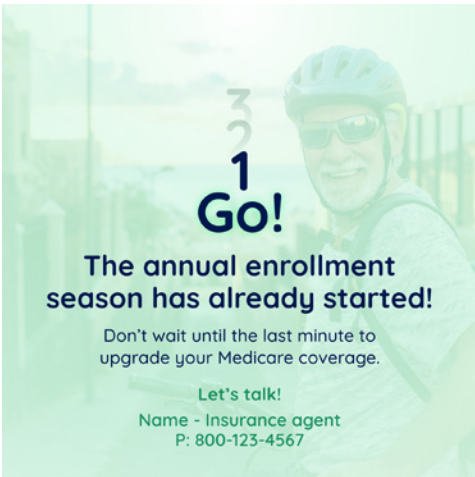
2



3

4

5



# Social Media Templates

1

## LIFE



There is no better feeling than knowing that you and your loved ones are safe and secure at all times.

**With your life insurance, worry less and live more!**

Contact me and receive a free quotation.  
Name - Insurance agent  
P: 800-123-4567

2

**Term Life insurance** vs.

Covers you for a set period.

Cheaper to buy when you're younger.

**Universal Life insurance**

Covers you for your entire life.

Access to cash value while living.

Are you interested in any of them? Call me

Name - Insurance agent  
P: 800-123-4567

3

# **LIFE INSURANCE TIP**

**Life insurance is cheaper** when you are young and lead a healthy lifestyle.

Contact me!  
Together we will find a life insurance policy that fits your needs.

Name - Insurance agent  
P: 800-123-4567



4

REMINDER



**Acquire life insurance any time of the year.**

Don't wait for trouble to happen.  
Buy your insurance now with me.

Name - Insurance agent  
P: 800-123-4567

5

Determining the coverage you need in your **Life plan is simpler** than you think.

Live fully and without fear.



Call me now!  
Name - Insurance agent  
P: 800-123-4567





# Mailing/Flyers

## Templates

1



Changes in life require changes in your health plan.

Hey!

Are you turning 26 soon, or have you recently moved out of state? Don't compromise your health, and update your medical plan now!

Get your ACA health insurance policy with me today!

- Affordable options.
- A policy that is tailor-made to your needs.
- Quotation in less than 24 hours.
- Acquire dental and vision services.

Contact me today!  
Name - Insurance agent  
P: 800-123-4567

2

Additional services without spending more money?  
**Contact me.**

Hey!

Want to update or change your ACA insurance policy but don't know how to do it?

I want to help you get the best benefits on your health insurance policy. Acquire dental and vision services without costing you more money!

Your health is my priority. Schedule a free quotation now!  
Name - Insurance agent  
P: 800-123-4567

3

The moment to upgrade your insurance plan is now!

Hello

Friendly reminder: Prioritize your health and the health of your loved ones by acquiring your health insurance policy on time.

The Open Enrollment Period is the only time when you can buy, renew or upgrade the benefits of your policy! Don't miss the opportunity.

Schedule your quotation with me free of charge.

Name - Insurance agent  
P: 800-123-4567

4

More health insurance benefits for less money.

Hi!

If you are looking for health insurance, you should make this decision with the help and advice of an expert.

- Affordable options.
- A policy that is tailor-made to your needs.
- Quotation in less than 24 hours.
- Acquire dental and vision services.

Receives quality treatment without worrying about how much it will cost you. One call for a lifetime of coverage.

Name - Insurance agent  
P: 800-123-4567

5

Don't miss this window of opportunity!  
Renew your health plan.

Hello!

The 2023 OEP starts November 1st. This is your opportunity to enroll, renew or update your health insurance plan.

If you don't already have an agent to help you find, renew or update your health insurance policy, call me now.

Name - Insurance agent  
P: 800-123-4567





# Mailing/Flyers

## Templates

1



The perfect time to change your medicare policy has arrived.

Hello!

As an expert licensed agent, I want to share with you three signs that you should change your Medicare plan:

- Doesn't meet your current needs and lifestyle.
- The out-of-pocket expenses are high.
- It's not giving you extended benefits and everyday essentials.

Do you want to upgrade your Medicare plan to one that suits you? I can help you. Contact me now!

\_\_\_\_\_  
Name - Insurance agent  
P: 800-123-4567

2

Do you know the different parts of Medicare?

Hey!

Are you turning 65 soon? This is the perfect time to take care of your health and understand your Medicare coverage options.

Remember that every part covers a different need:

Part A provides inpatient/hospital coverage.  
Part B provides outpatient/medical coverage.  
Part C (aka Medicare Advantage) offers an expanded way to receive your coverage with benefits and services not offered by Medicare.  
Part D provides prescription drug coverage.

Let's review and compare the best option for you!  
Call me if you need more information.

\_\_\_\_\_  
Name - Insurance agent  
P: 800-123-4567

3

Clear solutions to confusing Medicare words!

Hey!

If you hear 'Excess charge', 'Benefits Coordination', or 'Secondary payer' and don't understand what it means, I'm the right insurance agent for you!

Understanding the world of Medicare can be a challenge. Let my experience work for you to find your Medicare proper coverage.

\_\_\_\_\_  
Contact me now!  
Name - Insurance agent  
P: 800-123-4567

4

Want to change your Medicare plan?  
This is your chance.

Hello!

As an experienced insurance agent, I want to advise you so that together we can find the Medicare plan that offers you the best value for your money.

During this season, you can:

- Change from Original Medicare (parts A and B) to a Medicare Advantage Plan.
- Change from a Medicare Advantage back to the original Medicare.
- Switch to a different Medicare Advantage Plan.
- Switch from a Medicare Advantage plan that doesn't include prescriptions to one that does.

\_\_\_\_\_  
Contact me now if you want more information.  
Name - Insurance agent  
P: 800-123-4567

5

Your doctor & more benefits, a phone call away

Hi,

I know how important it may be for you to keep your primary care physician by your side.

If you are dissatisfied with the benefits of your current coverage, I can find the Medicare plan that will allow you to keep your doctor and, at the same time, improve your benefits.

Don't miss this opportunity!  
Call me now.

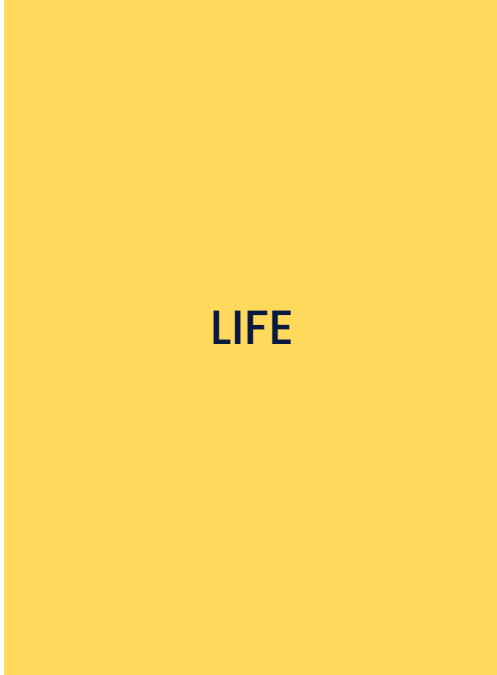
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Name - Insurance agent  
P: 800-123-4567



# Mailing/Flyers

## Templates

1



**Five** benefits and a lifetime of protection.  
Your life policy awaits you.

Hello!  
Prepare the umbrella before it rains! There's nothing to worry about when you are covered by your life insurance policy.

Take advantage of these benefits:

1 Pay off <b>future debts</b> for your loved ones	2 Leave your policy as an inheritance for your family.
	3 Pay the estate tax for your legacy. (Depending on state laws).
4 Paying off your home mortgage.	5 Providing funds for your kids' college education.

Take the right decision and contact me now to talk about the best life insurance policy for you.

Name - Insurance agent  
P: 800-123-4567

2



Does your job **cover your life insurance?**

Hi!


**Don't let your life insurance depend on your job.** If your current policy doesn't cover the mortgage or the ongoing bills, you need a different policy.

**Life insurance at work is a great asset, but having your family covered is a better one.**

Contact me now to upgrade your benefits!

Name - Insurance agent  
P: 800-123-4567

3



**True or lie:**  
Life insurance isn't for young people.

Hey!

**#InsuranceTip:** You aren't too young to purchase your life insurance. **This type of policy is cheaper when you are young and lead a healthy lifestyle.**

Here are three reasons why you should buy life insurance if you are young:


- 1 Young people are **more vulnerable** if any sudden **financial emergency** happens.
- 2 Your premium will be **lower**, and your policy will be **more affordable**.
- 3 Don't pass your debts to someone else, be covered if something **awful** occurs.

Schedule a personalized quote with me and find out what other benefits you can get!

Call me now.

Name - Insurance agent P: 800-123-4567

4



Let your life insurance **pay for you.**

Hello!

**Lose isn't a word in the Life insurance dictionary.**  
With the right coverage:

If you get terminally ill, your insurance pays.\*

- If you die early, your family gets paid.\*
- If your life is long, your insurance pays.\*
- If you get into an accident, your insurance pays.\*

**Life Insurance is designed to help you protect your future and the future of your family.** Get your quote now!

\*Terms and conditions apply

Name - Insurance agent P: 800-123-4567

5

We know how much you care about your family.  
**Protect them now!**


Hi!

Loving your family means seeking their well-being at all times. **With the right coverage**, you can access different insurance riders:

- Accidental death benefit
- Critical illness
- Disability Income
- Long-term care

**Reduce your budget**, not the benefits of your life insurance. Contact me for a free quote.

Name - Insurance agent  
P: 800-123-4567





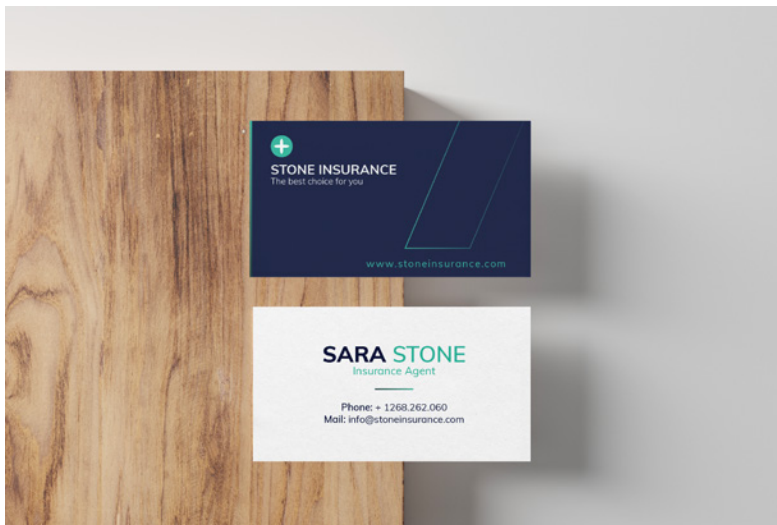

# Business Cards

## Templates

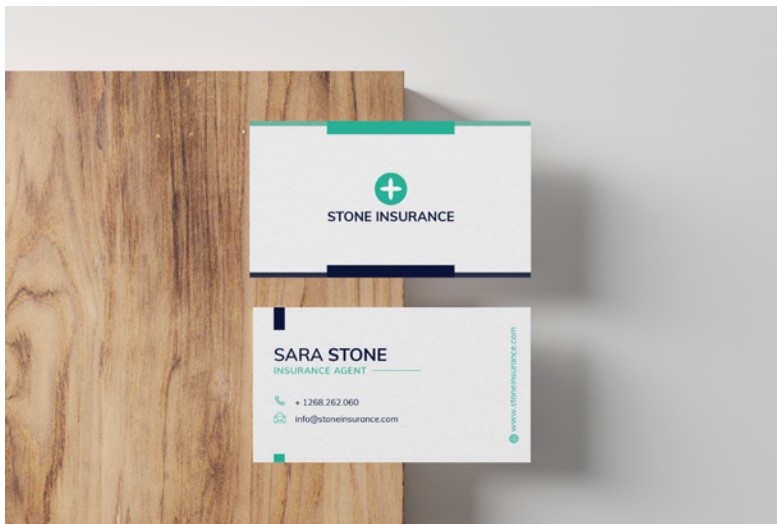
1



2








3



# SMS

Templates that you can send to your customers

## ACA






-  Hello! Did you know that independent insurance agents like me can increase the benefits of your ACA plan? Don't miss this opportunity! Reply to this message now!
-  (Client name)! Are you tired of comparing ACA policies on different websites and don't find the right option for you? I want to give you free consulting, so we can discuss the policy that suits your needs. Reply to this SMS to schedule one.
-  Hi! Thank you for scheduling your free personal quotation with me! We will analyze and upgrade your current ACA medical benefits. See you at this link (Meeting link).
-  Do you want to change your ACA policy and reduce your premium and copay? I'm (agent name), and I want to be your insurance agent to help you purchase a policy that won't cost you more money. Reply Yes if you would like me to contact you for a free quote.
-  Are you 26 and out of your parent's health insurance? Don't worry, I want to give you a free quotation, so we can find the policy that suits your needs. Reply to this SMS, and I'll contact you.



# SMS

Templates that you can send to your customers

## LIFE

-  Hello! My name is (agent's name), and I want to be your insurance agent. Did you know that if you respond to this SMS, you can acquire a life policy or upgrade the benefits in your current plan? Don't miss this opportunity.
-  Hey! Living life to the fullest is not a problem when you have an adequate Life Insurance policy. Have fun, and experience new adventures with no fears! Reply to this SMS and receive your free quotation! - Your insurance agent.
-  Did you know that, this year, 106 million American adults were without life insurance or underinsured? If you are one of them, but you want to know the benefits of having a life insurance policy, reply to this message, and I will reach you.
-  Stop wasting time worrying about what might happen. Better invest it in what you have always dreamed of! I want to give you a free quotation, so we can discuss the policy that suits your needs. Reply to this SMS for more information.
-  I'm (Agente name). Did you know that more than 50% of Americans overestimate the cost of life insurance by 300%? Being protected doesn't have to cost you a lot of money! Reply to this SMS and schedule a free quotation with me.

# Would you like to have all the pieces to apply this marketing manual for your business?

Ask your account executive for the graphic material of each of the chapters that you would like to have to start with your marketing plan and grow!

**WITH CLARO INSURANCE, GREATNESS IS INSURED.**

5201 Blue Lagoon Drive Ste. 843 Miami FL 33126

786 837 8447

[www.claroinsurance.com](http://www.claroinsurance.com)

