

26 IDEAS FOR GROWING YOUR FINANCIAL & INSURANCE BUSINESS

Create a contact sheet on Excel of everyone you know to send a once-a-month newsletter or infographic.

Respond to 10 people's social media posts per day to develop better connections and trust.

Do a social media posting once a day.

Put educational content about your industry in your newsletter, website, and social media once a week.

Attend as many gatherings as you can when invited. Be sure to meet new people and learn about them to establish a connection.

Look into joining non-profit associations, like Soroptimist, the Rotary Club, Lions' Club, and other charitable organizations to meet more people and connect.

Send information out to local escrow companies, notaries, and real estate agents once every 3 months to stay relevant and for them to remember you.

Attend conferences related to your industry and form a relationship with others in the business. Depending on their niche, you can give and get business from one another.

Join the local chamber of commerce but do not expect results quickly. After building relationships and trust, you'll get referrals and new business.

Grow your social media accounts by befriending people who are local to you. Once in a while, send a direct message just to remind them about your services.

Take flyers and information (newsletter) to your neighbors - leave them at the door so they know to contact you locally if they need services.

Prepare to send mailouts to all local businesses because business owners need insurance and finances services. Build relationships!

Speak at local events, write for magazines, and other publications three to four times each year to establish yourself as an expert in the field.

As difficult as it may be, do 100 to 200 cold calls per day to generate leads.

Work with a Title Insurance company representative to get a list of homeowners to send out mailers in the local 2 to 5 zip codes, depending on your budget.

See about getting a billboard sign done for a few months to establish yourself locally in the community.

Go online to look for individuals who hold licenses to send them mailers - Contractors Licensing Boards, Tax Preparer Boards, etc.

Ask business owners of the places you frequently visit if you can leave your flyers or newsletters at the front for clients to pick up.

If you have a storefront, see about getting advertising and signs to posted showing what new products you are offering or do sponsorships of local sports teams.

Give one or two free items to your clients each year, like a calendar with your info on it. It may be expensive but will help them remember you when needed.

See about putting an ad in a local magazine or newsletter but something in the ad that makes you stand out compared to your competition.

Develop relationships with business developers and commercial lenders. They can often refer you business.

For all existing clients, even ones you did quotes for, put them on your mailing list to send information and drum up new business.

Take treats, like coffee or doughnuts, to local businesses with employees along with your newsletters and flyers. Newsletters are more important.

When you hear of any good news or sad news from your contacts, be sure to send a card to show your compassion & care.

Purchase a lead-generating software or work with a company that provides this service.

