

# AP Campaign Plans

## Marketing Campaign Plan for Acquisition Pathways

- 6 areas to focus campaign on:
    - Retirement
    - Your focus off Medicare
    - Changing your career
    - Focus on your own health instead of selling insurance
    - Letting someone else take care of your clients
    - Changing your focus TO Medicare
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## SOCIAL MEDIA

**Platforms:** LinkedIn, Facebook, Instagram, Threads, X (Twitter)

- **Weekly Social Posts**
  - Each social post to reflect 6 “areas of focus”, 8 posts per focus (48 posts total)
    - Hashtags: #BusinessTransitions #InsuranceLegacy #AcquisitionPathways #InsuranceAgents #Retirement #MedicareAgent #MedicareInsuranceAgent #RetirementPlanning #Medicare #BusinessRetirement

## EMAIL

- **Monthly Emails**
    - 12 emails created and scheduled (more emails can be added, these will just be the ready to go emails designed to really hit our 6 areas of focus)
    - 2 emails per area of focus
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## MARKETING CAMPAIGN VERBIAGE IDEAS

### Retirement

- We've helped you service your clients from the start, let us continue to service them while you enjoy your retirement.
- You will be fairly compensated for the empire you grew. Aligning your book of business with us will ensure that your legacy of work will continue to thrive long after your retirement.
- "Is It Time For A Conversation? - Retirement"  
You have worked hard to be a success. We have ways to make sure your clients are cared for and that you receive the money you deserve. We are experts in transition. Let's talk.

### Your focus off Medicare

- Thinking about selling your insurance practice? Whether it's your entire business or just a portion, Acquisition Pathways provides the tools, guidance, and support to make it seamless. Learn how we can care for your clients, staff, and legacy.
- We've helped professionals like you transition their businesses smoothly. Hear from [Name or

Role] about their experience with Acquisition Pathways and why they trusted us to handle their legacy. [Read Their Story Link]

- **Subject:** Thinking of Selling Your Practice? We Can Help.
  - **Body:** Transitioning your business is a big decision, and we're here to guide you every step of the way. Acquisition Pathways specializes in helping agents like you plan, value, and sell their practices while ensuring your clients and staff are cared for. [Learn More Link]
- "Is It Time For A Conversation? - Making changes in your career?"  
The insurance industry is full of opportunity and challenges. If you find yourself needing to change your focus, call us. We are experts in transition.

## Changing your career

- We'll help you transition your corporation – we can handle the contract moves, financial backing, employee transitions, client notification, etc.
- Ready to explore the next chapter of your career? Let us guide the way. Start your journey with Acquisition Pathways today. [Get Started Link]

## Focus on your own health instead of selling insurance

- **Subject:** Worried About Selling? We've Got You Covered.
  - **Body:** Need to focus on your own health, but feeling unsure about the process of selling your practice? We handle everything from carrier communications to staff transitions. Our team ensures a smooth, stress-free experience for you, your clients, and your employees. [Contact Us to Learn More Link]
- "Is It Time For A Conversation? - Need to focus on your own health instead of selling insurance?"  
All of us can face health challenges to us or possibly a family member that needs your attention. No one can care for your clients just like you but if you need us to, we are ready to try.

## Letting someone else take care of your clients

- It's not about finances, it's about relationships – you've made promises that **we** can keep.
- Your clients deserve ongoing care, and your staff deserves a secure future. With Acquisition Pathways, you get:
  - Professional business valuations
  - Support with carrier communications
  - A tailored plan for your staff & clients

Let us help you transition with confidence.

- **Subject:** Why Choose Acquisition Pathways?
  - **Body:** With Acquisition Pathways, you're not just selling a business—you're securing a future for your clients, staff, and legacy. Our services include:
    - Professional valuations
    - Customized transition plans for staff and clients
    - Ongoing care for your book of business

[Explore the Benefits Link]

- "Is It Time For A Conversation? - Unexpected life change "  
Had an unexpected life change? We have a specialized team to help through challenging circumstances. Get the comfort from talking with one of our team who specializes in working with agents on business solutions when you face challenging situations.

## Changing your focus TO Medicare

- **Subject:** Start Your Journey Today
    - **Body:** Whether you're ready to acquire another book of business or just exploring your options, Acquisition Pathways is here to help. Let's start the conversation and create a plan that works for you.[Schedule Your Free Consultation Link]
  - "Is It Time For A Conversation? - Changing your focus to or from Medicare"  
Our industry is full of opportunity. We can help you maximize the options you have. We are experts in transitions.
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## SOCIAL MEDIA IDEAS (BEYOND THE TYPICAL IMAGE WITH TEXT)

- Infographic and blog post on "Myth-busting about selling practices, *Selling Doesn't Mean Letting Go of Your Legacy.*"
- Pass the Baton Challenge - social media campaign encouraging agents to share what they've learned in their careers with the next generation by "passing the baton."
- Series of short videos featuring agents who've successfully sold their businesses through Acquisition Pathways. Maybe have each person answer one questions. Keep these vids 2 minutes or under and they could be posted as YouTube Shorts.
- "Transition Tips" Carousel - Create swipe-through carousel posts offering quick tips on preparing for a business transition, like: (we could do several of these on different topics)
  - Why valuations matter.
  - How to talk to clients about selling your business.
  - Planning for your staff's future.
- What's Your Exit Plan? Poll Series - Use polls to ask fun, engaging questions:
  - "What's your dream retirement activity?"
  - "When do you plan to retire?"
  - "What's your biggest fear about selling your business?"
- "Pass the Practice" Giveaway - run a giveaway campaign encouraging followers to tag someone who could benefit from learning about Acquisition Pathways. Offer a prize, like a gift card or consultation, for participants.

- Meet the Team Posts - Introduce the Acquisition Pathways team with behind-the-scenes photos, fun facts, and insights into how they help agents through the selling process.
- “Build Your Future” Mini-Campaign - Post motivational content encouraging agents to think about what’s next after selling their practice, paired with actionable steps they can take.