

All About Branding Your Insurance Agency

And How to Do It Right!



AGENCY PERFORMANCE
PARTNERS

AGENCY APPEAL

MAY 2018

E-BOOK

Agency Branding

What can you expect?



ABOUT THIS E-BOOK

You have your insurance license but who ever thought you would need a degree in marketing to compete today? Marketing is complicated and can be overwhelming if you want to do it right. This E-book is designed to help you understand the first step in marketing your agency-building a brand. When you have the right look, feel and tone that attracts your target customers, marketing becomes enjoyable.

Topics covered in this E-Book:

- 1) What is a brand?
- 2) How a brand is created
- 3) Why use a professional that knows Insurance
- 4) What your brand should have in it
- 5) How to use your brand once you have it
- 6) How often should you update your brand

Our goal is to help educate you on the importance of investing in your agency's brand. Regardless if you use our services or seek out a local provider we want you to feel like you understand how insurance branding works and how important it is. We will take you through the branding journey so you understand the process and the value. As always if you have any questions on branding please reach out to us directly, we are always happy to engage in a conversation on your agency and your brand.



David Archibald
Owner Archibald Insurance

"Understanding that I had my hands full (running a busy office) while working on our new brand, they went at my own pace and didn't make me feel like I was in a rush or overwhelmed. I had time to carefully consider every step--which is the way I like to operate on such major projects. My new brand will be my foundation for years to come, and they really understood the importance of that and what it meant to my future."



What Is a Brand?



Branding can be a difficult concept to understand. It's similar to explaining being in love or describing a company's culture. Until you experience what a strong brand is and how it benefits an independent agency it can be a bit like an expensive mythical creature. So allow me to start by sharing what a brand solves for an independent agency:

- The ability to be clearly recognized by your target customers
- The opportunity to stick out from local, state and national competitors
- The visualization of your message to clearly state why do business with you
- The investment in making your business look appealing to top talent in your area

The best way to understand a brand is to start with yourself. You have very specific likes, dislikes, mannerisms and tastes. Each person is really a walking individual brand of themselves. Think about it you have certain colors or patterns you like wearing. You may like to drive a certain car, or speak with a certain dialect? All of these little bits and pieces mold together to create you. Based on your likes, looks, and tone you leave an impression on everyone around you. Similar to your personal brand, your business has the ability to have a brand literally created and tailored to present the message that you and your team want to craft toward your target customer.

When you think about the most powerful brands in America, Apple, Amazon, Mercedes, Walmart, Target and more you immediately know by saying their name what they are about, It's more than their name and logo; it's the types of people they use in their ads, the message they are spreading and the feeling you get when watching it. For me I'm not a Walmart fan, but I'm not their target customer. For their target customer they speak volumes. I prefer Amazon who I believe has a brand developed for me. You may feel about branding how your clients feel about a commercial audit, you think you understand it, not really sure it's worth it but necessary no matter what.



Steve Holley
Holley Insurance

"Agency Appeal's process was awesome. They were able to collect input from our staff and clients and ultimately nailed who we are as a business. Now, we have all of the documentation, creative elements, and guidance to portray our agency the way that we really want to be seen."



How is a Brand Created?



Creating a brand is a labor of love. Seriously. You take a little bit of history, mix it with a little bit of culture and values, roll it into a compelling story, and bake at 350 for 25 minutes.

Well, everything but the last part, anyway.

Every business and individual already has a brand. A brand is simply what people think about when they hear your agency's name and what they say about you when you're not around.

The insurance agencies that take an active and intentional role in creating and maintaining their brand have an opportunity to create the story that they want told.

Every interaction that you and your team have with the public – every phone call answered, email sent, every interaction on social media, every time someone sees one of your ads or flyers, your brand is being developed. It doesn't matter if you're handling a major claim for one of your top clients or if you're having a quick conversation with someone on the field during your kid's soccer game – everything you say or do can impact how the public perceives your business – it all shapes your brand.

Your brand is going to be created whether you like it or not. The question you need to ask yourself is, do you want to leave something that important to chance or do you want to ensure that a consistent message is always being told? A message that accurately reflects your agency's mission and values – a message and visual identity that can help you connect with your customers and prospects in a way that goes beyond “we sell insurance” and instead helps you, the local independent insurance agency, stand out amidst all of the noise from the direct writers and national carriers.



Linda Fischer
Owner, Cardinal Insurance

When making a decision about branding our agency, I was struggling with how to find the right tagline and logo that pulled our 'why' and agency name into alignment with one another. Upon hiring Kelly and her team, they quickly surveyed each team member and obtained some background information from me as the owner to discover who we are and where we are going. A few weeks later they presented me with 3 choices for a new logo, color scheme and entire branding kit including font sizes, styles and photo and graphic details. Not only is it incredibly convenient to give this guide to our vendors for everything from agency designed shirts to marketing materials to client correspondence, but the Agency Appeal team so nailed who we are and why we exist. They in fact did such an incredible job that I will be hiring them again for the branding for a niche market I am now forming.

How is a Brand Created?



The best way to take control of your brand and your agency's messaging is to always use a consistent set of guidelines to guide all of your marketing efforts – whether you're developing a new website or welcome kit, or drafting up some new phone scripts and email templates, your message needs to be consistent in order to be effective. Going through the process of creating your brand guide will help you solidify exactly how you want your insurance agency to be perceived, and it'll give you the tools to ensure that your message is always delivered consistently.

When we create brands for insurance agencies, we spend time learning about the history of the agency as well as their vision for the future. Before we decide where you're going we want to make sure that we understand where you've been.



Sandra & Chris Spivey
Owners Spivey Insurance

Kelly and her team have always been such a pleasure to work with. We reached out to them when we were struggling on being able to show and tell the story of our agency. They started a process of getting to know us, our staff and agency. It was really a simple process and their involvement was amazing. They ended up giving us several options for our agency brand. We couldn't be happier with our brand, our website and other marketing avenues that Kelly and her team have provided for us. They are more than 5-star company to us, more like a 10 in our book. Their customer service is far more superior than any other company that we have worked with before. They care about their clients and have always treated us like a true friend. They answer our emails, answer our phone calls and go up and beyond to make sure we have been taken care of. Their follow up is awesome. We are so blessed to have formed this partnership with Kelly, Eddy and the rest of their amazing team.

Why Use a Professional Who Understands Insurance?



As an insurance professional you make recommendations to your clients on a routine basis. Based on your level of expertise and your understanding of the markets you are licensed and qualified to help guide people down a confusing journey of protection. We can all agree that an independent agent is the best choice for insurance but it's really your expertise that people value. It's no different when working with a branding agency. You should work with the professionals that understand the industry, the consumer and what works.

When using a branding firm that doesn't understand insurance, it will take some time from you to invest in educating them. In our industry we have unique terms, ideal customers and most importantly the experience to know that we can be a little daring when it comes to branding. If you want to look like a bank pick any branding firm. If you want to look like Mike Stromsoe, Chris Paradiso, Donna Yother or Linda Fischer you use us. Why are we different? We all have backgrounds in insurance and can speak your language. Next, we also know the intricacies of transforming from a more traditional brand to something more modern and fresh. Finally, our client list says it all. The top marketers in insurance are turning to us to help them refine and define their brand image.



Chris & Kaitlyn Pintarich
Owners, Berry Insurance

Having a distinct brand message means we can be consistent across all marketing media and have simplicity in all areas of training - whether that be marketing, sales or service. With the support and guidance of Agency Appeal, we were able to define who we are and what we wanted to be known for in a concise and cohesive manner.



What's In a Brand?



When you think of a “brand,” what’s the first thing that comes to mind? A logo? A color scheme? A catchy slogan or tagline? Maybe it’s a feeling that you get when you think about your favorite local business?

A brand is all of that, and more.

As an independent insurance agency, your brand is your livelihood – it’s what people say about you when you’re not around. It’s how you make them feel. It’s the message that you and your entire team deliver to your community, whether intentionally or unintentionally.

Many times, when people say that they want to develop a brand, they’re only thinking about the surface level stuff – the logo, the colors, etc - but creating a brand is much more than that.

When you create a brand, you’re creating a experience. The best brands have consistent and repeatable messaging that make you feel a certain way.

Apple makes you feel like you could be a tech-savvy creative genius just by buying one of their devices.

Nike makes you feel like you can get out there and do anything that you set your mind to.



Chris Paradiso
Owner Paradiso Insurance

I use Agency Appeal for all of my design work. Everything from our website, calendar, magazine and Paradiso Promises has been created by the team at Agency Appeal. They are easy to work with and capture exactly the feeling and results my agency is looking for.



What Your Brand Should Include



Starbucks has created a repeatable experience that allows them to make you feel the same warmth, friendliness, and personalized service that you'd expect from a small, locally owned coffee shop – but they're a massive organization.

What does your brand make your community feel and how can you influence that?

Taking the time to develop your brand takes you from reactive to proactive. Instead of waiting idly by, you're putting guidelines, processes, and procedures in place to ensure that, throughout every interaction, your community is receiving the same message, the same way – a message that reinforces your values and your mission. Consistency is the key to branding and the easiest way to be consistent, is to ensure that everyone on your team is using the same set of guidelines – whether they're the receptionist answering incoming calls, the producer trying to break another sales record, or your marketing team creating content and interacting with your community on social media – your entire organization needs to be on the same page. Consistency matters.

Still with me? Great. So now you're probably wondering “Okay, sure – this all sounds great. But how?!”



Ashley Brower Whitney
Harbor Brenn Insurance



Going through the branding process with Kelly & Eddy was one of the best investments we made last year. They created a brand for our agency based on our input, thoughts and ideas, and far exceeded my wildest expectations. The brand guide has allowed us to create a unified messaging platform, with a consistent brand and presentation in our community. When we've needed an ad created quickly for a last minute publication, the guide has allowed us to work with an advertising professional giving them everything they need to create the perfect ad quickly, efficiently and without a lot of back and forth (and they've been our favorite ads ever!) Our social media presence is much more organized, consistent and on brand. The guide just makes it easy – we don't need to spend a ton of time picking out colors, or wording, or fonts or anything. Staff is volunteering at a community event? Grab a pic, throw a “we love Petoskey” badge on the corner & post to Facebook – super simple. We've also customized our welcome cards, thank you cards, any material that is printed/mailed to the insured with our “look” and it's been very well received.

What Your Brand Should Include



Brand Guides!

A well executed Brand Guide will help you onboard new team members, create better marketing materials, work more effectively with vendors, and more. It's your marketing playbook.

A great Brand Guide will:

- Pay homage to your insurance agency's past while providing direction for the future.
- Outline how you should communicate with your community. Voice, tone, and language styles matter.
- Provide guidelines for the types of imagery and accents that should be used in your marketing materials.
- Provide guidelines for how to properly use your logo and your color palette so that everything remains consistent.

A well-branded agency should be able to create marketing materials that scream "This is us!" Your community should be able to tell, at a glance, that the website, email, or Facebook post was sent from your agency, even if they didn't see your name or logo – because they'll just feel it.

Remember, your insurance agency is going to have a brand whether you like it or not. Shouldn't you spend some time to make sure that your brand is showcasing the mission and values that matter most to you?



Donna Yother
Sava Insurance

One of the best marketing decisions we made was to have a brand guide developed for our agency. It has helped our 2 person marketing team become so much more efficient. We now have confirmed colors, patterns, and tone of our content that is in our brand which allows the management approval process turn around to go much smoother. Working with the AA team I felt they really worked to understand my agency and how we wanted to present our brand in our marketing.



How To Use Your Brand Once You Have it



Once you have your brand new brand, it's time to take it to life. We can't let it sit on a shelf, it's ready to get out in to the world and make a difference, Your brand needs a grand debut. The first thing you need to do is get to sharing it with your team. They should be able to see, read and understand the business they are connected to on a daily basis. Your best bet is to have a brand reveal party at the office. Get food, cups and plates that are all in brand. Also, the best agencies provide swag bags for their team with clothing, business cards and more to help promote the new look. Remember your team can be walking billboards if we outfit them with the right clothing! With the new brand it will certainly be something they will want to wear.

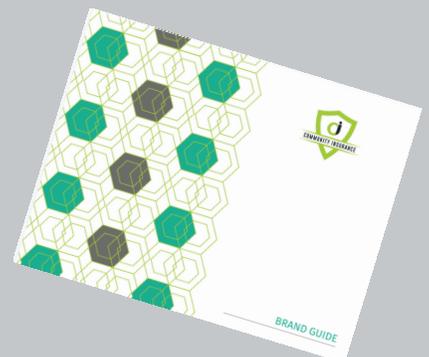
Next it's time to take a brand inventory. We do recommend you have a plan to replace the old with the new but let's face it throwing out 5000 envelopes isn't eco friendly. You can make a plan to each quarter update some new things (signs, letterhead etc.) This way you can budget but keep pushing the new look. We also encourage you to order some brand stickers. This way in a pinch you can cover up the brands of the past.

As your new vibe gets out in the community you should certainly consider giving your 24/7 sales person (your website) a face lift too. For many new clients your website will be one of the first impressions they have of your agency. Upgrading your website shouldn't be done with a light switch, You want to make sure your content matches your new tone, your website matches your new look. Make sure you make this a priority as a great new website can take several weeks.



Melissa Blenker
Owner Community Insurance

"Working with Kelly and Eddy gave my agency an identity and direction. Having the brand guide has given the agency new life with my team, our communities, and our customers. We weren't able to adequately describe who we were before, but now it's crystal clear!"



How Often Should You Update Your Brand Guide?



If branding is all about consistency, that means this whole branding thing is a one-and-done process, right?

Wrong.

Your brand, like your insurance agency, is a living, breathing, evolving thing. As your business changes, your brand should reflect those changes. But how often should you update your branding? Often enough to keep people noticing you but not so often that you start confusing your community and diluting your core message.

Your brand's core messaging likely won't change very often, because your core messaging should be ingrained into the DNA of your agency – it's who you are, what you stand for, why you do what you do, and how you do it. It's how you make people feel. Updating your brand should be very intentional and tactical. Here are a few instances where updating your brand may make sense.

You Expand

Independent insurance agencies are often seen as pillars in their communities – and rightfully so! Because of this, your branding should be a reflection of that community. But what happens if you expand into a new community? The types of imagery used and even some local vernacular may need to be updated to include your new community. A New York City based insurance agency who expands into a smaller, sleepy town may need to adjust some of their branding to include imagery that includes both big-city and small-town themes.

Times Change

Nostalgia is great, to a point. As design aesthetics, best practices, and technology evolve, your brand should follow suit. Remember – you want your brand to stand out, but for the right reasons – not because your marketing materials look like they're straight out of the 80s.

Things Start to Feel Stale

Branding is all about making people feel something and if things start to feel stale or if there's a major shift in your community, it may be time for an update.

Whenever you're thinking about updating your brand, it's important to remember that you're not starting over – you're tweaking, adjusting, and refreshing. Your core message shouldn't change – but the delivery may.

About The Authors



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*Co-Founder Agency
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Eddy DeMelo is an experienced digital marketer, with a focus on Organic Strategies. Since 2006, he's spent his time working in a number of challenging verticals, including the travel, automotive, legal, and insurance spaces. He's worked with businesses of all sizes, from small mom-and-pops, to well established nationally recognized brands. Connect with him on social platforms, via email at eddy@agencyappeal.com, or by phone at 401-714-4392.



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Kelly Donahue-Piro, is the founder and president of Agency Performance Partners. She is a no-nonsense effectiveness expert who has helped hundreds of insurance agencies identify and capitalize on sustainable improvement opportunities. Her specialties include:

- agency culture assessment and change;
 - management & supervisory coaching and benchmarking;
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