



# Revenue Booster<sup>®</sup>

*a turnkey program to grow P&C agencies*

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## *Participating carriers*



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## Introduction

Historically, the majority of P&C agencies do not make their clients aware that they can provide life insurance for several reasons:

1. They have no process to stimulate interest from the book of business and don't know how to build one.
2. If interest is expressed, the agency does not have an easy process to obtain coverage.
3. The agency has no personnel to handle a new process.

Your clients want to buy life insurance. According to LIMRA (2023 research)

- 36% of Americans intend to buy life insurance within the next 12 months.
- Another 16% state they need it but, don't have it.
- Those two numbers equal 52% of the population- and is a good estimate for your book of business.

The Revenue Booster © will provide you with a platform to:

- Easily create interest for life insurance from your personal lines book of business.
- Provide a simple, fast & easy way to obtain the coverage for interested clients.
- With NO additional staff.

If you are serious about increasing your revenue by adding life insurance, then your business needs the Revenue Booster ©.

## Will this work for me?

This plan is for any P&C agency, that would like to grow with an additional revenue stream and increase client retention by adding Life Insurance, Disability, Critical Illness, Accident, Hospital, Dental + Vision plans, and more!



## Resources You Bring

- Commit and implement a new process for your personal lines CSR's
- Add a link to your website where your prospects and clients will go to educate themselves about life insurance and then purchase it.

## Resources Provided

- Training for your existing staff without adding demands to what they do today
- Products that meet the needs of your customers online technology
- Proprietary multi-product, multi-carrier, online sales platform for Life Insurance and Financial Service agents, called Insure Me Now Direct.

# How the Program Works

Revenue Booster © is a simple set of steps that are intuitive but hard for many to execute

- 1. Create interest
- 2. CSRs ask a question at the end of every conversation
- 3. Train CSRs for initial responses
- 4. Place a link to the innovative life product application in email signatures
- 5. Create outbound marketing



## 1. Nothing happens until you create interest

The best possible time to create interest in buying life insurance is when your clients are interacting with your CSR buying or changing coverage. The new auto, house, boat, RV, etc. has created debt that needs to be covered via insurance. Or, maybe they are making changes to these properties and increasing coverages, adding drivers, etc.

## 2. Ask the client

While on the phone and when you finished with the coverage at hand, you ask a simple question ~ Would you like to have a death benefit with this?

## 3. Train for Responses

Possible client responses are

<i>Client Response</i>	<i>CSR Answer</i>
What do you mean or what is that?	You can get a death benefit to pay off the loan/mortgage.
Why?	You are covering the property to protect the lender or others. The death benefit, which is life insurance, pays off the lenders in the event of your death.
How much does it cost?	The easiest and fastest way to learn how much it costs, and to apply (if interested), is to go to our website, <a href="http://www.bestP&amp;Cagent.com">www.bestP&amp;Cagent.com</a> , and click on life insurance.
Oh, so it's life insurance?	Yes, and it is easy to apply and if you qualify, you can get coverage in less than 10 minutes by going to our website.

That is the only conversation needed by the CSR's. We suggest that the CSR follow up with an email stating that it was a pleasure to visit with them today and thank them for their business and remind them to check out the website and click on life insurance.

#### **4. Email signatures**

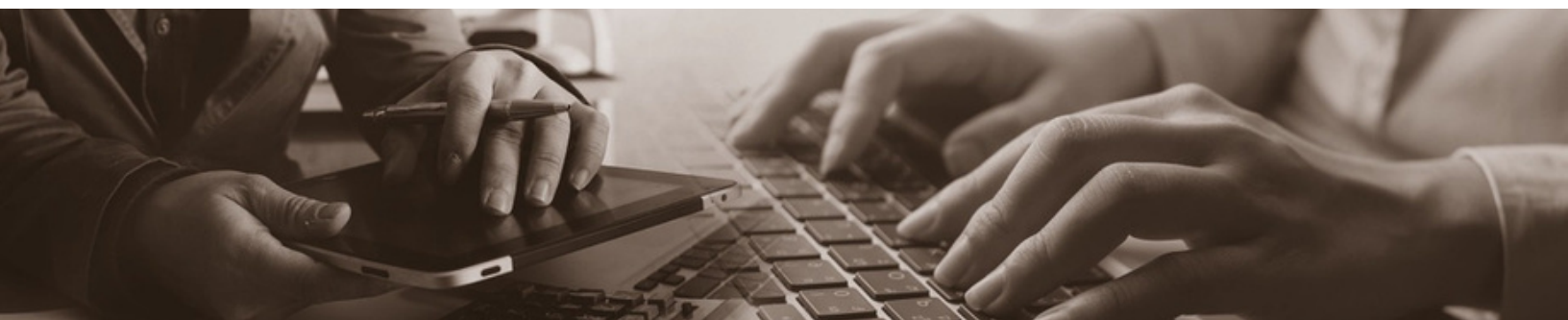
Click **HERE** to apply for life insurance with no medical exam, no paperwork and no waiting around with our online application process. If you qualify, you will be approved in less than 10 minutes.

#### **5. Outbound marketing**

- Data base – There are several pieces of marketing material that is available that you can use to market to your data base.
- Social – There are many resources to choose from to support your social presence. If you haven't gone social yet, you can use this material to help you get started.
- Renewals - when coverage is renewing, mention life insurance and provide link.

## **Timeline**

- We will set a day/time to review the product and technology
- We will get you contracted
- Once contracted;
  - » We will provide you with your unique URL to add to your website. Or if you prefer a fully customized experience we can review that option with you.
  - » We will get you comfortable with the product and how your clients will be buying life insurance from you.
- While we are going through the contracting process, we will review with you the questions that you will start requiring your CSR's to use at the end of each client and prospect interaction/conversation.
- We will set a day/time to review this new process with your CSR's. Your introduction of Revenue Booster © and us to the CSR's requires that you state that you are requiring this of each CSR going forward.





## Goals and Measurement

How many customers do your CSR's speak with on a daily basis? Assume one CSR speaks with 20 clients a day. Let's also assume that only 25% (5) of those calls may have interest. That is 25 (5 x 5 days) possible clients interested in buying life insurance (from you) in one week. If only 25% of those apply for coverage, that is six (6) clients that bought life insurance from you that week.

The beautiful part, all you had to do was ask a question. No additional employees, no taking life insurance applications, no ordering of medicals, and all of the follow-up that usually goes along with selling life insurance.

**Revenue Example:** The activity outlined above would generate 300 sold policies in a year. Using a small monthly premium of \$35 or \$420 annually equals \$100,000 of revenue for your agency.  
(300 policies x \$420 annualized premium = \$126,000 annual premium x 80% = \$100,000)

The good news, you can assist all of your client's life insurance and supplemental retirement needs. We will work with you on a case by case basis so you don't have to figure out what to do next.

We have provided you with a platform that will easily increase your revenue. Questions to think about;

1. What would you like to accomplish with this project?
2. When do you want to start?

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