KRAUSE

Marketing Tools Every Insurance Agent Should Be Using



Presented by
Amy Beacham, MBA

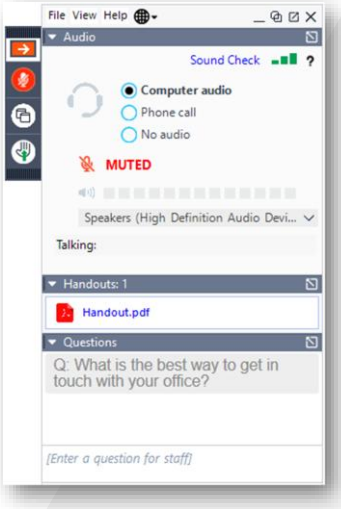
July 9, 2026

KRAUSE AGENCY

1

Questions & Handouts

- Download **today's handouts** from the GoToWebinar toolbar.
- Don't forget to **complete the survey** at the end of the presentation!



KRAUSE

KRAUSE AGENCY

2

About Us

Krause Agency is a national wholesaler of insurance products tailored to the senior market. With a focus on asset preservation solutions, we provide products, training, and support to agents and advisors helping clients plan for retirement and long-term care.



30+
Years of Experience

400+
Clients Helped Monthly

1,300+
Active Agents

KRAUSE AGENCY

KRAUSE

3

Today's Goals

1. Explore the core pillars of a marketing strategy designed for agents like you.
2. Discuss specific tactics and ideas to include in your marketing mix.
3. Identify tools to support your marketing efforts and efficiency.



KRAUSE AGENCY

KRAUSE

4

Core Pillars of Your Marketing Strategy

Content Strategy

Communicating often and effectively to your prospects and clients is key.

Strong Website

Your website is the primary way your clients and referral sources learn from you, engage with you, and come to trust you.

Engaging Social

Active social media pages help build your credibility and encourage engagement from your audience.

Leveraging Referrals

Most agents find their most lucrative prospects through client or peer referrals.

KRAUSE

KRAUSE AGENCY

5



Content Strategy

KRAUSE

KRAUSE AGENCY

6

Types of Content to Incorporate

- **Blog Posting:** Keeps your site fresh and active, builds credibility and trust, easy way to create other types of content.
- **Email and Newsletters:** Allows you to stay in touch with existing clients and remain top-of-mind.
- **Digital and Physical Handouts:** Provide easy-to-access educational information for clients.
- **Social Media:** Build trust and credibility with your audience, engage with clients, and collect reviews.
- **Direct Mailers:** As digital noise continues to increase, emphasizing traditional ad forms will help you stand out.

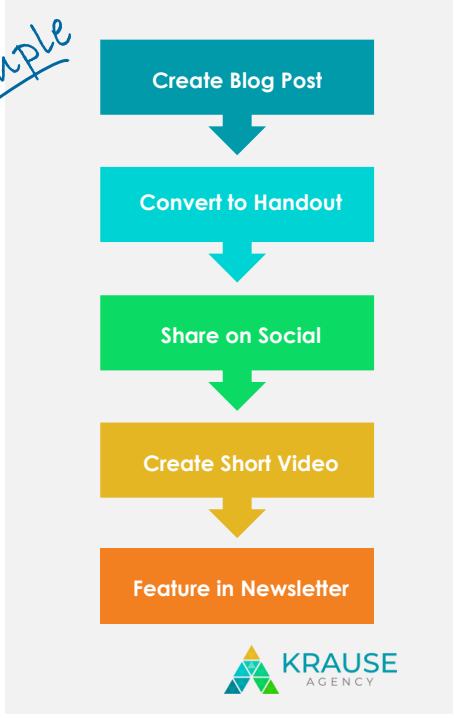
KRAUSE

KRAUSE AGENCY

7

Repurposing Content

- The idea of creating content for all these items may seem intimidating, but the ideal approach is to repurpose one piece of content as many times as possible.
- This creates efficiency for you and reinforces the messaging to your audience.



KRAUSE

8



Strong Website

KRAUSE

KRAUSE AGENCY

9

What Makes a Functional Website?

- **Mobile-Friendly Design:** Most of your clients are likely visiting your site from their phone.
- **No 404 Pages:** If someone hits a broken link or 404 page, they'll likely leave your site.
- **Site Speed:** People have short attention spans!
- **Navigation and Accessibility:** Make it easy for people to find what they're looking for.

KRAUSE

KRAUSE AGENCY

10

What Makes an Engaging Website?

- **Clear Messaging:** Determine your message and repeat it often.
- **Up-To-Date Information:** Ensure your information (both personal and product/service) is current.
- **Regular Content:** New blogs are good for SEO/AEO and ensuring your site looks active and relevant.
- **Valuable Information:** Allow your prospects to learn from you and build trust that you're an expert.
- **Frequent CTAs:** Make sure people know how to work with you and what the next steps are.

KRAUSE

KRAUSE AGENCY

11

SEO vs. AEO

- SEO (Search Engine Optimization) is the process of improving your website to rate higher in organic search rankings.
- AEO (AI Engine Optimization) is the process of improving your website to appear in AI-generated answers from programs like Gemini, ChatGPT, and Claude.
- We're in the age of **zero-click marketing**! Optimizing your site for AEO and SEO is key.

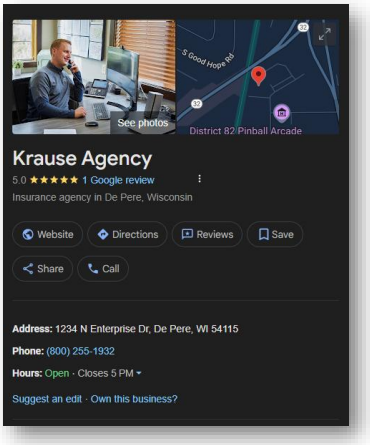
KRAUSE

KRAUSE AGENCY

12

Google My Business

- Maintaining an updated **Google business profile** is also key to your online presence and allows people to easily find your website and information.
- A "My Business" profile is free to set up and Google walks you through the process step-by-step.
- It's a great place to collect **reviews** as well!

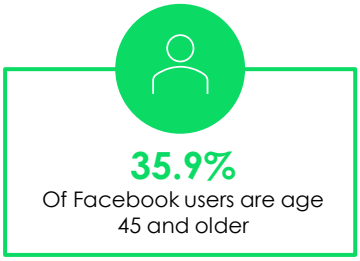




Engaging Social

Facebook

- Facebook is likely the **#1 social media platform** your clients are on.
- Like having an up-to-date website, having an active Facebook page is key to legitimizing your business.
- Your social posts can include:
  - ***Sharing your blog or other links to your website***
  - ***Tips and insights on your products and services***
  - ***Articles relevant to your target audience***
  - ***Personal or staff highlights***
  - ***Holiday celebrations***





KRAUSE

KRAUSE AGENCY

15

Facebook Strategy

- **Focus on gaining legitimate followers.**
  - Invite prospects and clients to like your page both on and off Facebook (newsletter, mailer, etc.).
- **Encourage engagement on your posts.**
  - The more people engage, the more they'll see from your page.
- **Understand Facebook's algorithm.**
  - Facebook likes videos and links more than photos and plain text posts.
- **Drive traffic back to your website.**
  - Make sure you're posting content that brings people back to your website, like blogs.

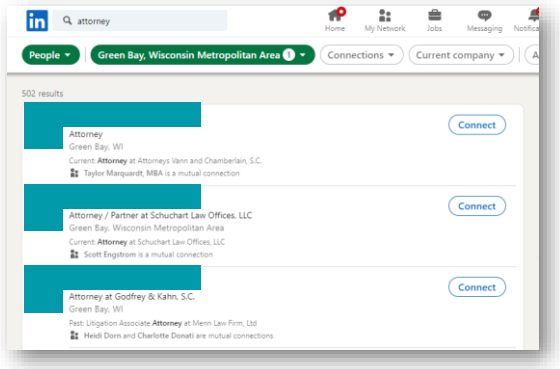
KRAUSE

KRAUSE AGENCY

16

LinkedIn

- LinkedIn is a great platform for furthering your referral network efforts.
- Identify other professionals in your area and connect with them.
- You can search by job title, location, and degree of connection!



KRAUSE

KRAUSE AGENCY

17

LinkedIn Strategy

- Focus on organic posts from your **personal** account.
  - Business pages are less likely to have a following on LinkedIn.
- Frame your content in a way that helps the professionals in your network.
  - "Check out my recent blog for tips on how your clients can save money in retirement."
- Make sure you engage with other people's content.
  - "Great article – thanks for sharing, John!"
- Understand what LinkedIn likes…**video is key right now**!

KRAUSE

KRAUSE AGENCY

18

Additional Considerations

- There are several social media networks out there that you may be wondering if you should incorporate into your marketing strategy.
- Consider the following:
  - ***Are the appropriate demographics on this platform?***
  - ***How much time do I have to post on this platform regularly?***
  - ***Will I have to devote some spend to this platform?***
- A stale social presence is harmful to your credibility!

KRAUSE

KRAUSE AGENCY

19



Leverage Referrals

KRAUSE

KRAUSE AGENCY

20

Why Referrals Matter

- Especially when it comes to personal or financial matters, the average consumer relies heavily on referrals from trusted sources.



97% of people read reviews before choosing a local business, including insurance.

Referral programs see 71% higher conversion rates and 37% higher retention than non-referred customers.

KRAUSE

KRAUSE AGENCY

21

Getting Referrals

- **Just Ask:** Identify opportunities within your sales cycle to ask existing clients for referrals, likely at closing and when they've had a good experience.
- **Make it Easy:** Provide referral cards or brochures for easy access to your information.
- **Emphasize Reviews:** Whether on Google or Facebook, client reviews build credibility.
- **Leverage Reviews:** Use testimonials as content on your website and in sales collateral to drive home your value.

KRAUSE

KRAUSE AGENCY

22



Tools to Start Using Today

KRAUSE

KRAUSE AGENCY

23

Content Generation and Editing

- Tools like Claude and ChatGPT help you brainstorm, create, edit, and repurpose content.
- When used correctly, you can save significant time and resources in your content creation.
- Beware of misinformation or mispositioning.

KRAUSE

Claude

- Free or starts at $17/mo for access to additional features like Claude Design

ChatGPT

- Free or starts at $8/mo for additional uploads, image creation, and memory

KRAUSE AGENCY

24

SEO and AEO Optimization

- With a heavier focus on SEO and AEO, tools like Moz and Ahrefs are key.
- These tools allow you to learn more about SEO and AEO, research keywords, track AI visibility, and track competitors.

KRAUSE

MOZ

- Starts at $49/mo for a single website

ahrefs

- Starts at $129/mo

KRAUSE AGENCY

25

Social Media Management

- Your social media strategy will only be successful if you stay active.
- As a baseline, you should be creating a monthly social calendar and planning posts in advance (this can be accomplished with tools like **ChatGPT** or **Claude**).
- For a more in-depth approach, try programs like **Hootesuite** and **Loomly** that allow you actually manage your social posting through their platforms.

KRAUSE

Hootsuite™

- Starts at $99/mo
- Best suited for managing several platforms

loomly

- Starts at $49/mo
- Includes easy approval process if someone else is doing your scheduling

KRAUSE AGENCY

26

Design Support

- With the emphasis on social and sales collateral, it's important to have a design resource.
- Tools like Canva and Claude Design make it easy to create postcards, flyers, presentations, social images, and more.
- These program include native AI tools to help create sophisticated designs beyond filling a template.

KRAUSE

27

Canva

- Free or starts at $144/year for access to premium tools, templates, and stock imagery

Claude

- Starts at $17/mo for access to the Claude Design feature

KRAUSE AGENCY

Video Creation

- Video is a key part of any marketing strategy—it can be used on social, in newsletters, as client touchpoints, etc.
- Simply use your phone or your webcam to record yourself or use an AI video editor to create your own clips from video stock footage.

KRAUSE

28

descript

- Starts at $16/mo
- Includes filler word removal and studio sound enhancement

OpusClip

- Starts at $15/mo
- Includes auto posting to certain social channels and filler word removal

KRAUSE AGENCY



Questions

KRAUSE

KRAUSE AGENCY

29

KRAUSE

To learn about this webinar topic and more, scan the QR code and schedule a call with our team!



KRAUSE

KRAUSE AGENCY

30

Thank you

for attending today's session!

(800) 255-1932
krauseagency.com

KRAUSE



31