TRUSTED CHOICE®

# Public Relations Toolkit for Independent Agents

BIG i®

Trusted Choice®
INDEPENDENT INSURANCE AGENTS

# TABLE OF CONTENTS

Introduction ........ 3-11

Identifying Newsworthy Stories ........ 12-16

How to Write a Press Release ........ 17-21

Leveraging LinkedIn ........ 22-27

Speaking with the Media ........ 28-33

Building Media Relationships ........ 34-36

Event Participation and Promotion ........ 37-45

Maximizing Media Coverage ........ 46-48

Conclusion ........ 49-50

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ROSENGROUP

SECTION 1

# INTRODUCTION & PR 101

# Trusted Choice Public Relations Toolkit For Independent Agents

As a Big "I" member, you're part of a national network of independent agents who make a difference every day in their communities. You build relationships, create trust, and help people protect what matters most. That local connection is one of your greatest strengths, and public relations (PR) is one way you can amplify it.

This guide was created specifically for independent agents like you—to help you tell your story, elevate your reputation, and position your agency as a trusted leader and community partner.

Inside, you'll find practical tools and examples to help you:

- ✓ Strengthen your local presence and visibility.
- ✓ Communicate effectively with clients, partners, and media.
- ✓ Manage your reputation and respond confidently in challenging moments.
- ✓ Leverage Big "I" and state association resources to support your outreach.

Whether you're just getting started or looking to take your PR efforts to the next level, this guide offers actionable steps to help you build awareness, credibility, and long-term success for your business and the independent agent brand.

**Now, let's explore what PR really means for your agency—how it works, why it matters, and how you can use it to share your story and grow your business.**

# INTRODUCTION

PR is more than press releases and media headlines—it's about building relationships, shaping perception and telling your story in a way that earns trust and builds credibility. As an independent insurance agent—whether you're a solo practitioner, small business or a growing large agency, strong PR can help you connect with your audience, protect your reputation and stand out in a crowded world.

This toolkit is designed to give you practical, easy-to-use advice on PR. Inside, you'll find guidance on how to communicate effectively, work with the media, manage challenges, and highlight the strengths of your agency and brand. The goal isn't to make you a PR expert overnight, but to provide you with the support, tools, and confidence to develop a PR program that highlights your work among your stakeholders and community.


## PR 101

With the proliferation of content, finding ways to engage with current and potential customers can be tricky. Earned media, generated through public relations, is an important piece of any insurance agency's overall strategy to connect with consumers and generate awareness for your business. In concert with marketing and advertising efforts, an effective PR strategy will build your brand, help increase your customer base, educate consumers and further reinforce the importance of working with an independent agent.

*At its core, PR is about managing how a person, company or organization is perceived by the public, namely through earned media. Instead of focusing on direct sales or advertising, PR builds and maintains a positive reputation through communication and relationship-building.*

### SOME KEY COMPONENTS OF PR INCLUDE:

- **Messaging and branding:** Shaping how the public sees your brand, product, or leader.
- **Media relations:** Working with journalists and publications to earn media coverage.
- **Crisis management:** Protecting and repairing reputation during times of crisis, such as a problem or scandal.
- **Community engagement:** Building trust through events, sponsorships and outreach.
- **Digital presence:** Managing social media and online reputation.

*Think of it as telling your story and influencing public perception so people trust, respect, and support you.*

# PR vs. Marketing vs. Advertising

PR, marketing, and advertising are closely related but are not the same. They serve different purposes in how businesses and brands communicate. Marketing is about selling, PR is about storytelling and advertising is about promoting. Together, they reinforce each other: Successful marketing and advertising can strengthen PR, and good PR makes marketing and advertising more effective. ***So fundamentally, how do they differ?***

| Public Relations (PR) | Marketing | Advertising |
|---|---|---|
| **GOAL:**<br>Build trust, credibility, brand awareness and a positive reputation. | **GOAL:**<br>Driving engagement and recognition through effective communication. | **GOAL:**<br>Persuade consumers to take action, increasing sales and growth. |
| **FOCUS:**<br>Building relationships with the public, media and greater community. | **FOCUS:**<br>Promoting your brand, products or services directly to customers. | **FOCUS:**<br>Paid, controlled/strategic promotions across various advertising platforms. |
| **TACTICS:**<br>Press releases, thought leadership, media outreach, crisis management and community events. | **TACTICS:**<br>Market research, branding, campaigns, promotions, content marketing and SEO. | **TACTICS:**<br>Ads shared across various platforms—TV, radio, print, online ads, billboards or sponsored posts. |
| **CONTROL:**<br>**Earned**—you persuade journalists or influencers to share your story. | **CONTROL:**<br>**Owned or paid**—you create/distribute the message via your own channels or paid efforts. | **CONTROL:**<br>**Paid**—you control exactly what is said, when it runs and where it goes. |
| **EXAMPLE:**<br>You are quoted in a local newspaper about how to best select auto insurance for a new teenage driver. | **EXAMPLE:**<br>A social media campaign highlighting a new team member, or your latest product offerings. | **EXAMPLE:**<br>Running a Facebook ad targeting local families and active consumers with a discount code promotion. |

*Successful marketing and advertising can strengthen PR, and good PR makes marketing and advertising more effective.*

# Owned, Paid and Earned Media

Owned, earned and paid media each play a distinct but complementary role within a comprehensive communications strategy. When aligned, these three forms of media reinforce one another: paid drives awareness, owned deepens engagement, and earned builds trust—creating a powerful, cohesive communication ecosystem.

- **Owned media,** like a campaign's website, email list and social channels, serves as the foundation, providing consistent messaging and a trusted hub for information.
- **Paid media,** including digital ads, mail and sponsored content, amplifies that message, targeting key audiences and driving them back to owned platforms.
- **Earned media,** such as coverage from news outlets, adds credibility and expands reach through third-party validation.


When aligned, these three forms of media reinforce one another. Paid drives awareness, owned deepens engagement, and earned builds trust—creating a powerful, cohesive communication ecosystem.

*In communications, it's important to use a mix of owned, paid, and earned media to reach audiences. Each serves a distinct role, and the strongest strategies integrate all three for maximum impact.*

## Owned Media

Channels a brand fully controls.

**EXAMPLES:** Website, blog, newsletters, social media accounts, brochures.

**PROS**

- Full control over messaging and timing.
- Cost-efficient because internal/owned.
- Builds long-term equity (SEO, subscriber base).

**CONS**

- Limited reach without amplification.
- Takes time to build audience trust and traffic.

## Paid Media

Any exposure a brand pays for to promote content, reach or visibility.

**EXAMPLES:** TV and radio spots, social media ads, display ads, billboards, search marketing, sponsored content, influencer partnerships.

**PROS**

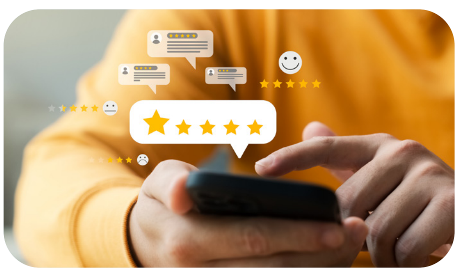
- Scalable reach and precise targeting.
- Controlled environment.
- Quick deliverability.
- Useful for driving traffic to owned channels.

**CONS**

- Costly - paid by exposure/reach.
- Lack of long-term equity and ROI without sustained engagement.
- Less trust or perceived authenticity.

## Earned Media

Unpaid third-party coverage or organic recognition.



**EXAMPLES:** Press coverage, word-of-mouth, social shares, online reviews.

**PROS**

- Highly credible (third-party validation).
- Expands reach beyond owned audiences.
- Can generate lasting reputational value.

**CONS**

- Limited control over message or timing.
- Harder to predict or measure.
- Requires consistent effort.

*A balanced media strategy leverages all three—using owned to anchor the message, paid to boost reach, and earned to build trust.*

# PR Best Practices

PR is both an art and a strategy. It's not just about getting media attention—it's about building relationships, telling your story in a compelling way, protecting your reputation and reinforcing brand awareness over the long term.

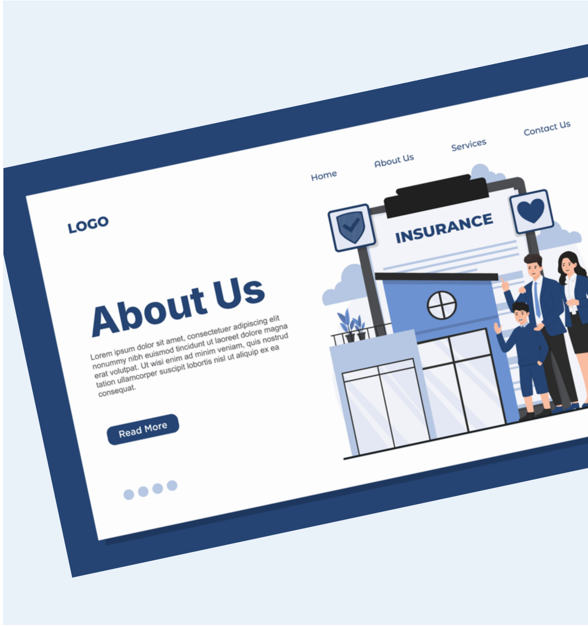
**Let's review some best practices to help you approach PR with confidence and impact.**

### Know Your Story

- Define your mission, vision and values so they come through clearly in every piece of communication.
- Develop key messages with short, repeatable phrases that reflect what you want people to associate with you, your brand, and/or your agency.
- Highlight your unique value, such as what makes you stand out compared to others.
- Practice your "elevator pitch" so you can explain who you are and why you matter in under 30 seconds.

### Build Relationships with Authenticity

- PR is built on trust and credibility. Get to know journalists, editors and influencers before you pitch them. Follow their work, engage with their content and understand their audience so your outreach feels relevant.
- Offer them useful resources, such as expert insights, statistics, access to leaders or broader story ideas, not just promotional material.




### Tailor Your Message to Your Audience

- While your broader mission and vision remain unchanged, each audience has unique interests,, and your messages need to be adapted accordingly. Journalists want newsworthy angles: Why does this matter now?
- Use clear language that resonates with everyday people, avoiding complex language, jargon and buzzwords.
- When possible, tell stories rather than listing facts. Facts can be additive and supportive, but stories that connect emotionally are easier to remember.

## Stay Consistent Across Channels

- Consistency builds recognition over time and reinforces trust; even subtle differences in how you present yourself can confuse your audience.
- Align your message across your owned, earned and paid platforms, such as website, press releases, social media, newsletters and public appearances.
- Use consistent branding, tone, and visuals so your organization feels cohesive.

## Be Proactive, Not Just Reactive

- Don't wait for big announcements. Share smaller updates regularly to build and maintain recognition as a thought leader.
- Look for opportunities to comment on industry news or local events—position yourself as a knowledgeable, reliable voice.
- Pitch timely and relevant ideas to media rather than waiting to be approached. Being visible and available makes you more likely to be quoted.

## Leverage Multiple Platforms

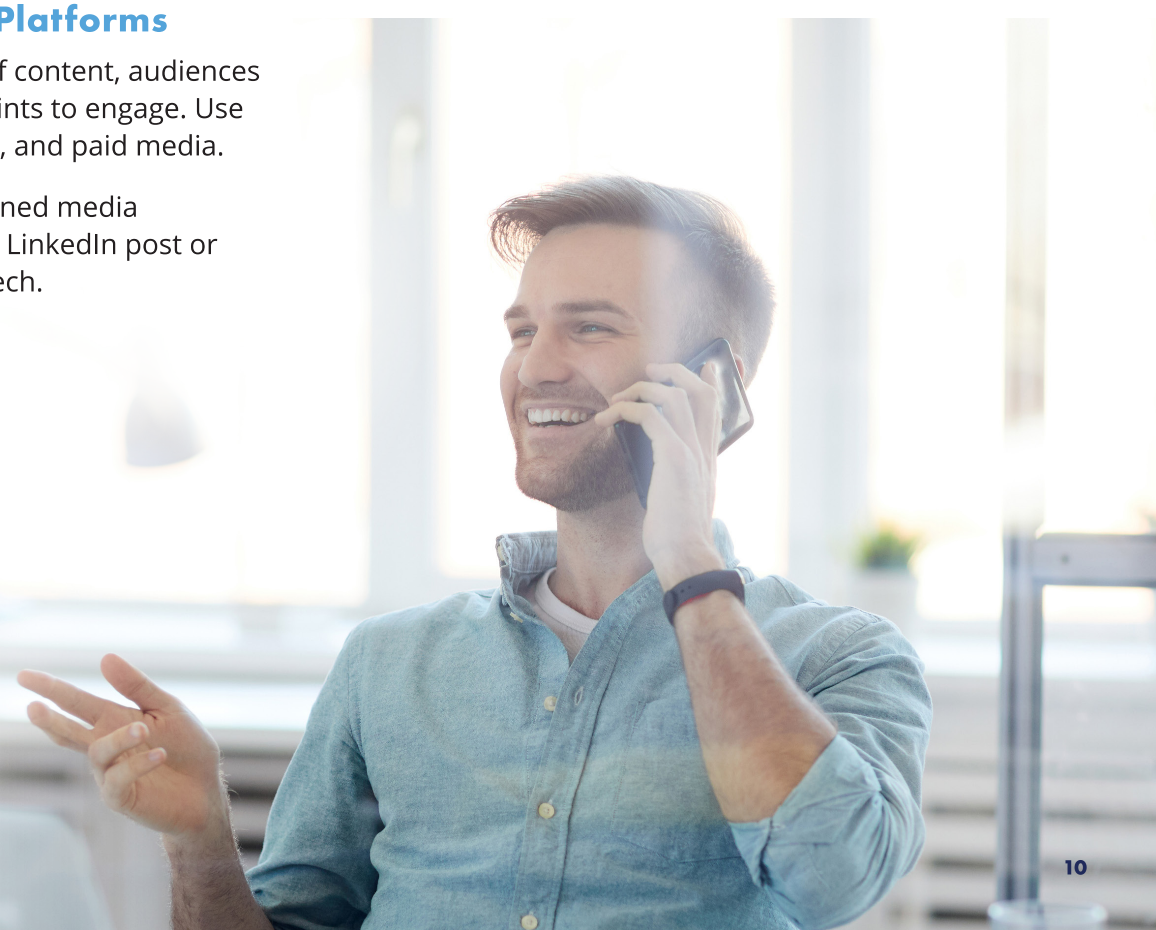
- With the proliferation of content, audiences need multiple touch points to engage. Use a mix of earned, owned, and paid media.
- Repurpose content: earned media coverage can become a LinkedIn post or talking points for a speech.

## Monitor and Measure

- Track your mentions in the media and on social platforms to understand how you're being talked about.
- Use tools like Google Alerts, social listening software or media monitoring services.
- Measure success with both qualitative metrics, such as tone of coverage, message accuracy and sentiment,and quantitative metrics, such as reach, impressions, engagement and website traffic.
- Regular evaluation helps you refine your strategy and demonstrate PR's value.

## Think Long-Term

- PR isn't about one viral moment or a single splashy headline. Sustainable recognition and success build over time.
- Commit to steady storytelling: consistent updates, thought leadership, and visibility.
- Treat PR as part of your broader brand and business strategy, not as a separate activity.



# PR Tactics

PR campaigns come alive through the tactics you use to share your story and engage your audience. Here's a list of proven PR tactics that independent insurance agents can use:

### Media Relations

- Write and distribute press releases about newsworthy updates.
- Pitch story ideas or expert commentary to journalists.
- Build a media list of relevant reporters and outlets in both your industry and local community.

### Storytelling and Content Creation

- Publish thought leadership articles via blogs, op-eds and LinkedIn posts.
- Share customer success stories or testimonials.
- Create case studies to highlight impact and results.
- Develop video content, including interviews and explainers.

### Thought-Leadership

- Submit op-eds or guest columns to local newspapers or industry publications.
- Place leaders as speakers at conferences or panels.
- Position yourself as a go-to expert for media commentary.

### Events & Community Engagement

- Host launch events, ribbon cuttings, or milestone celebrations.
- Organize community service or charity events to show values in action.
- Sponsor or participate in local festivals, conferences, or panels.
- Use virtual events, such as webinars and livestream Q&As, to expand reach.

### Influencer & Partner Collaboration

- Partner with influencers, bloggers, or podcasters to reach new audiences.
- Collaborate with community leaders or nonprofits to build goodwill.
- Co-create content with partners to amplify visibility.

### Awards, Recognition & Credentials

- Apply for industry awards to boost credibility.
- Highlight certifications, milestones, or rankings.
- Publicize wins through media and social posts.

Through strategic communication, media coverage, community involvement and thought leadership, PR can position your insurance agency as a reliable and customer-focused business. It also helps differentiate the agency from competitors, reinforce the value of working with an independent insurance agent, manage its public image and generate awareness about its services—all of which contribute to attracting new clients and retaining current ones.

SECTION 2

# IDENTIFYING NEWSWORTHY STORIES

# IDENTIFYING NEWSWORTHY STORIES

As an independent insurance agent, you have a unique vantage point in your community. You see the risks, concerns and challenges that affect local families and businesses every day. This perspective allows you to share stories that matter to the public while positioning yourself as a trusted local expert.

Not every update is newsworthy. Part of engaging with the media is knowing what is compelling for coverage. The better you can recognize what makes a good story, the more likely you are to earn media coverage and strengthen relationships with both clients and prospects.

## What Makes a Story Newsworthy?

Reporters and editors look for stories that are timely, relevant, and relatable. When evaluating whether something is newsworthy, ask yourself: ***Why should people care about this right now?***

Stories that offer a local angle, highlight the human impact, and provide practical advice are most likely to resonate.


## THREE STEPS TO IDENTIFY A NEWSWORTHY STORY:

1. **Find a timely hook.**
Link your story to current events, seasonal risks or recent news.

2. **Highlight human impact.**
Demonstrate how the issue impacts individuals, families, local businesses or key community stakeholders.

3. **Add your expertise.**
Explain what the story means and offer clear, practical guidance.

## KEY STORY ELEMENTS

A useful guideline: If your story checks at least two of these boxes—and you round it out with your expert perspective—it has strong potential to be newsworthy.

Ask yourself, is this story timely, relevant, local, showing human impact, or unique?

**TIMELY:** Connected to current events, seasons, or new legislation.

» **Example:** Tips for preparing homes before hurricane season, or explaining how a new insurance law affects local drivers.

**RELEVANT:** Directly tied to people's wallets, homes, businesses, or safety.

» **Example:** Explaining why homeowners premiums are rising in your area and how families can save money.

**LOCAL:** Grounded in your community, county, or region.

» **Example:** Sharing why hail damage claims have surged in your county and what homeowners should review in their policies.

**HUMAN IMPACT:** Illustrates the issue through a person, family, or business.

» **Example:** A family forced to relocate after a fire without renters' insurance—and how others can avoid the same outcome.

**NOVELTY:** Highlights something unusual or first-of-its-kind.

» **Example:** A rise in porch-pirate thefts during the holidays or more deer-related car accidents in your area.

## STORY CATEGORIES TO EXPLORE

Once you understand the elements that make a strong story, the next step is to identify the types of stories most likely to resonate with the media and your clients. **Common story angles include:**

- **Insurance outlook.** Rising premiums, inflation and extreme weather impacts.
- **Affordability and access.** Guide clients through rising premiums or changes in their area's policies.
- **Homeowners and property risks.** Tips for preparing for hurricanes, floods, wildfires and other disasters.
- **AI in insurance.** How technology is reshaping underwriting, claims and customer service.
- **Auto insurance.** Discuss the impact of EVs, distracted driving or other trends.
- **Legal trends.** Explain how regulatory change and litigation affect coverage/premiums.
- **Financial wellness.** Offer guidance on reviewing or renewing policies as part of a broader personal finance review.

## Learning from Local News

Another way to spark ideas is by paying attention to what local reporters are already covering. If rising auto thefts or flood risks are making headlines, you can step in with expert commentary that informs and educates your community. Watching these trends helps you anticipate what reporters find useful—and shape your own stories accordingly.

## Newsjacking

### Joining Bigger Conversations

You don't always have to wait for a local development. National headlines and breaking news can be opportunities to provide local context. This practice, known as "newsjacking," enables you to tap into stories that are already capturing attention and make them relevant to your community.

#### NEWSJACKING EXAMPLES

- A local news story reports a rise in basement flooding in your town. Provide expert tips on flood coverage, preventive measures and how homeowners can avoid costs.
- A new federal law affects small business insurance. Explain what it means for local entrepreneurs and how they can adjust policies to stay compliant.

## Planning with an Editorial Calendar

Some of your strongest opportunities won't come from reacting, but from proactively planning. An editorial calendar helps you map out predictable story moments tied to seasons, observances and consumer behaviors.

#### SEASONAL CONTENT EXAMPLES:

**December:** Winter weather preparedness.

**Spring:** Flood insurance reminders.

**August:** Back-to-school safety.

**October:** Fire Prevention Month safety tips.


# What's Not Newsworthy

**Just as important as knowing what is newsworthy is knowing what isn't.**

Celebrating a minor anniversary or moving offices may matter to your staff and clients, but they typically don't interest the media. The same applies to highly technical updates or self-promotion that lacks a clear community benefit.

That doesn't mean these stories have no value—they're often a better fit for owned channels like social media, newsletters or your website. Sharing them there helps strengthen brand presence, celebrate company culture, and keep clients engaged.

**A GOOD TEST:** If the story only matters inside your office, it's probably not media-worthy. If it connects to people's lives or your broader community, it has potential.

SECTION 3

# HOW TO WRITE A PRESS RELEASE

# HOW TO WRITE A PRESS RELEASE

A press release is one of the most effective public relations tools to share your story in a credible, structured way that journalists can easily digest and use. A press release lets you set the tone for your news, highlighting the points that matter most. It provides the opportunity for your business to say: “Here is something we want to share that is new and noteworthy happening with our business, and we’d like people to know about it.”

This section serves as a guide designed to equip you with the knowledge and resources to craft clear, compelling announcements that showcase the value of your independent agency and services, while underscoring the acumen and expertise of the business’s agents.

### WHY MIGHT YOU WANT TO SEND A PRESS RELEASE?

- ✓ Inform the media about notable company news (i.e. product launches, acquisitions, rebrands, etc.) updates in hopes of securing media coverage.
- ✓ Announce a new hire, promotion, office opening or professional milestone.
- ✓ Highlight recent awards, recognitions or accolades.
- ✓ Promote new services, partnerships or mergers.
- ✓ Provide expert commentary on timely or news-breaking insurance issues.
- ✓ Share involvement in community events, such as charity initiatives and sponsorships.


### WHEN NOT TO USE A PRESS RELEASE:

- ✗ **Every day updates:** Routine promotions, sales, or small internal changes. Anything better suited for email or social.
- ✗ **Opinion pieces:** Thought leadership/opinion pieces work better as blog posts or op-eds.
- ✗ **Targeted communication:** If you just need to update existing customers, a newsletter or direct email is more effective.
- ✗ **Engagement goals:** If the primary goal is conversation, social media is typically more effective.

# PRESS RELEASE FORMAT

## Media contact

- Include the name, title, phone and email of the person you'd like the media to contact about the release.

## Headline

- Keep this clear, concise and impactful.
- Example: "Independent Insurance Agents Launch Nationwide Program to Expand Consumer Access to Coverage"

## Subheadline (optional)

- Add this to provide additional context or supporting details in one line.

## Dateline

- List the "CITY, STATE" from where your business is located. Add a hyphen and include the date of release.
  - **Example:** "ALEXANDRIA, VA - September 1, 2026"

## Opening (lead) paragraph

- A summary of the who, what, when, where and why.
- Clearly emphasize the value this news announcement brings to stakeholders, customers, the insurance industry or the public.

## Body paragraphs

- Expand on the lead paragraph with key details such as:
  - Survey findings or statistics
  - Background on event, initiative, program
  - Implications for brokers, clients, or the insurance market

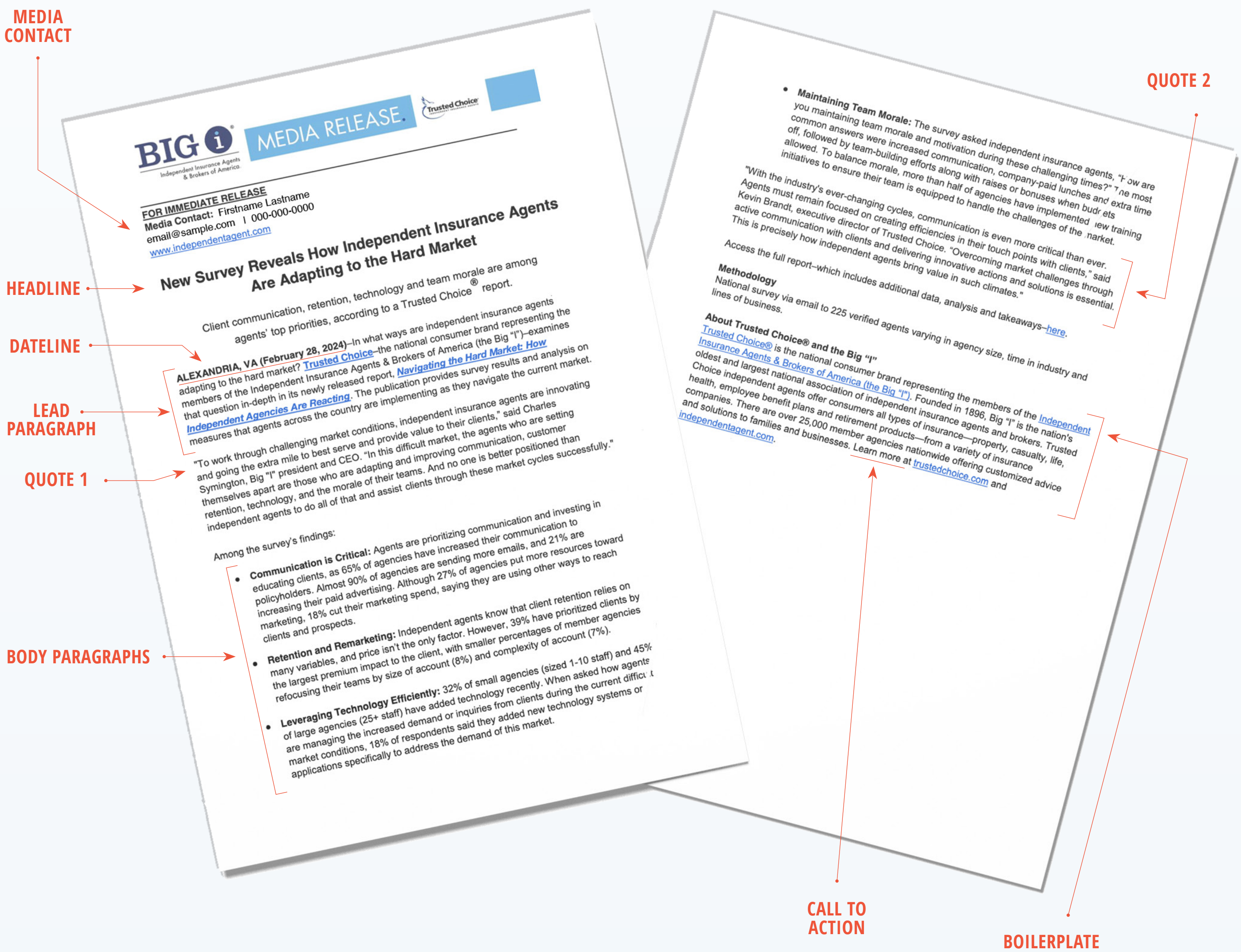
## Quote(s)

- One or two quotes from executive or leadership members of your insurance business.
- These quotes should offer fresh perspectives on the news or announcement, rather than repeating already stated facts.

## Boilerplate

- **Standard "About Us" section,** where you can describe your agency, including its name, year founded, the clients it serves, services it offers, what sets it apart from competitors, its mission statement, its reach or locations, and a call to action such as "Learn more at [website]."
  - **Example:** *"About John Smith Insurance Co. Founded in 1993, John Smith Insurance Co. is a family-owned, independent insurance agency serving individuals and businesses throughout the tri-state area, with offices in Jersey City and New Haven. By representing more than 20 top-rated carriers, John Smith Insurance Co. helps clients find the right coverage for auto, home, life, and commercial needs. Our independence means we work for our clients—not the insurance companies—providing unbiased advice, personal service, and tailored solutions. Learn more at www.J-Sinsuranceco.com."*

# PRESS RELEASE FORMAT AND STRUCTURE EXAMPLE




BIG i® Independent Insurance Agents & Brokers of America

MEDIA RELEASE.

Trusted Choice®

FOR IMMEDIATE RELEASE
**Media Contact:** Firstname Lastname
email@sample.com | 000-000-0000
www.independentagent.com

**New Survey Reveals How Independent Insurance Agents Are Adapting to the Hard Market**

Client communication, retention, technology and team morale are among agents' top priorities, according to a Trusted Choice® report.

**ALEXANDRIA, VA (February 28, 2024)**–In what ways are independent insurance agents adapting to the hard market? Trusted Choice–the national consumer brand representing the members of the Independent Insurance Agents & Brokers of America (the Big "I")–examines that question in-depth in its newly released report, ***Navigating the Hard Market: How Independent Agencies Are Reacting***. The publication provides survey results and analysis on measures that agents across the country are implementing as they navigate the current market.

"To work through challenging market conditions, independent insurance agents are innovating and going the extra mile to best serve and provide value to their clients," said Charles Symington, Big "I" president and CEO. "In this difficult market, the agents who are setting themselves apart are those who are adapting and improving communication, customer retention, technology, and the morale of their teams. And no one is better positioned than independent agents to do all of that and assist clients through these market cycles successfully."

Among the survey's findings:

- **Communication is Critical:** Agents are prioritizing communication and investing in educating clients, as 65% of agencies have increased their communication to policyholders. Almost 90% of agencies are sending more emails, and 21% are increasing their paid advertising. Although 27% of agencies put more resources toward marketing, 18% cut their marketing spend, saying they are using other ways to reach clients and prospects.
- **Retention and Remarketing:** Independent agents know that client retention relies on many variables, and price isn't the only factor. However, 39% have prioritized clients by the largest premium impact to the client, with smaller percentages of member agencies refocusing their teams by size of account (8%) and complexity of account (7%).
- **Leveraging Technology Efficiently:** 32% of small agencies (sized 1-10 staff) and 45% of large agencies (25+ staff) have added technology recently. When asked how agents are managing the increased demand or inquiries from clients during the current difficult market conditions, 18% of respondents said they added new technology systems or applications specifically to address the demand of this market.
- **Maintaining Team Morale:** The survey asked independent insurance agents, "How are you maintaining team morale and motivation during these challenging times?" The most common answers were increased communication, company-paid lunches and extra time off, followed by team-building efforts along with raises or bonuses when budgets allowed. To balance morale, more than half of agencies have implemented new training initiatives to ensure their team is equipped to handle the challenges of the market.

"With the industry's ever-changing cycles, communication is even more critical than ever. Agents must remain focused on creating efficiencies in their touch points with clients," said Kevin Brandt, executive director of Trusted Choice. "Overcoming market challenges through active communication with clients and delivering innovative actions and solutions is essential. This is precisely how independent agents bring value in such climates."

Access the full report–which includes additional data, analysis and takeaways–here.

**Methodology**
National survey via email to 225 verified agents varying in agency size, time in industry and lines of business.

**About Trusted Choice® and the Big "I"**
Trusted Choice® is the national consumer brand representing the members of the Independent Insurance Agents & Brokers of America (the Big "I"). Founded in 1896, Big "I" is the nation's oldest and largest national association of independent insurance agents and brokers. Trusted Choice independent agents offer consumers all types of insurance—property, casualty, life, health, employee benefit plans and retirement products—from a variety of insurance companies. There are over 25,000 member agencies nationwide offering customized advice and solutions to families and businesses. Learn more at trustedchoice.com and independentagent.com.

# BEST PRACTICES

- Avoid using overly technical, industry-specific jargon unless absolutely necessary.
- Keep messaging clear, concise and tie the news back to the broader insurance industry or consumer impact.
- Make sure to proofread and also have a colleague double-check it for accuracy, spelling and names.
- If distributing a release in coordination with a specific timed event or announcement, use a clearly noted embargoed date and time, which indicates when the information can be published or shared publicly.

# DISTRIBUTION

## Media

- Local press outlets in the communities where your business, executives, or target customers are based.
- Insurance industry trade media.
- Business and financial media reporters.

## Website

- Post to the “News” section of your insurance business’s website.

## Social Media

- **LinkedIn and Facebook:** Post a link to the press release shared on the website to your personal LinkedIn and Facebook pages.
  - Share any press coverage of the release.
- **Instagram (optional):** Share a link to the press release on the website in your story, which supports direct links. Or consider adding a link to your profile.

## Newsletter

- Include a summary within your company newsletter and include a link to the full press release on your website.

SECTION 4

# LEVERAGING LINKEDIN

# LEVERAGING LINKEDIN

LinkedIn is one of the most powerful social media platforms independent insurance agents can use to promote and grow their business. LinkedIn offers opportunities for agents to build credibility by showcasing their expertise, sharing agency news, growing professional networks, highlighting community involvement, and engaging with current and potential clients, as well as industry peers and colleagues.

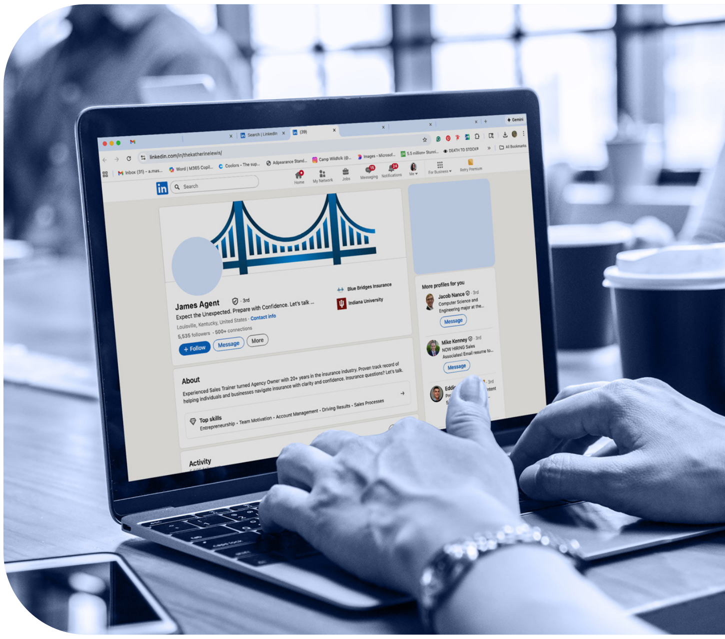
**Strategically using the platform is crucial, and in this overview, we'll share tips and tactics that you can utilize to make key connections, stay top-of-mind and reinforce the trusted, personalized service that sets Big "I" members apart.**

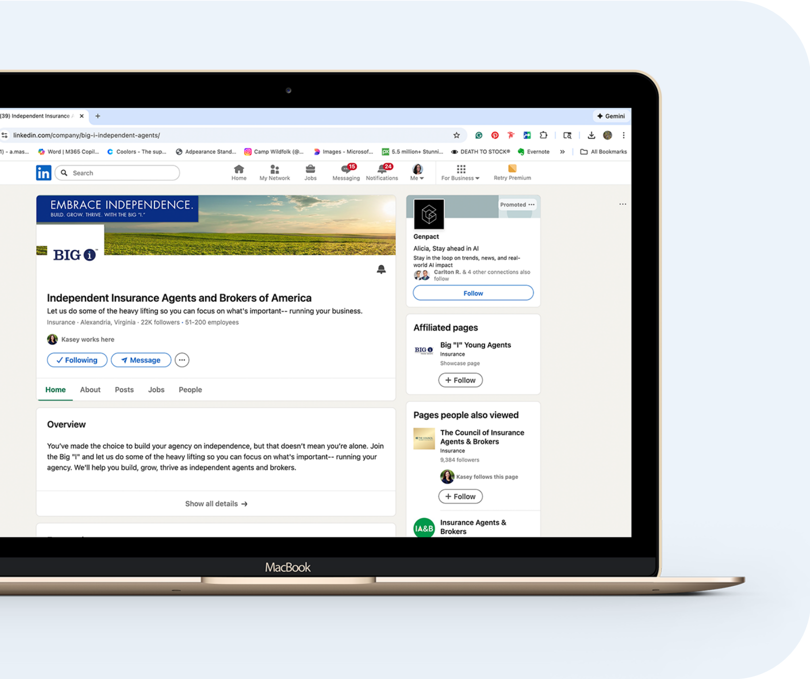
# Personal LinkedIn vs. Business Page

When using LinkedIn, it's essential to distinguish between your personal page and business page, as both play distinct yet complementary roles in building your professional online presence.

## Personal LinkedIn Page

- Represents you as an individual professional.
- Can showcase your personal brand, work experience, accolades, degrees and certifications.
- Allows you to share posts, updates about your role, build relationships, engage with others' content and distribute thought leadership pieces with peers, colleagues, clients and members of your local and business community.
- Posts from personal LinkedIn pages often have higher engagement rates than business posts because they feel more personalized and relatable to other users.




## Business LinkedIn Page

- Represents your insurance agency as a business and brand.
- Can share company news, team updates, services and community involvement.
- Provides analytical data, such as insights on visitors, followers, posts, employee engagement and how your business page compares to other competitor business pages on LinkedIn.

# Enhance Visibility and Engagement on LinkedIn

**The following strategic tactics are designed to organically bolster your business's LinkedIn presence and serve as an effective communication tool to enhance brand awareness further.**

- Post business updates such as new hires, promotions, awards, milestones or expanded services.
- Establish credibility and expertise by sharing thought-leadership insights on insurance trends, potential risks, compliance and solutions.
- Build brand visibility by regularly sharing posts that keep your business top-of-mind with clients, prospects and colleagues.
- Share recent media hits and press releases with your network.
- Showcase your involvement in community initiatives, such as sponsorships, charity initiatives and partnerships with other local businesses.
- Attract potential clients by showcasing the value of your business's personalized services through social media posts.
- Recruit top talent to your agency by highlighting your team, accolades and culture.
- Boost your SEO standing by having active LinkedIn business pages, which tend to rank higher in search engine results.

# Long-Form, Native Articles on LinkedIn

Long-form, native articles are in-depth posts that go beyond short updates, a quick announcement or a few sentences. These articles are posted directly on LinkedIn and typically run between 500-1,500 words.

They allow users to share their deeper insights on industry trends and updates, expertise and personal perspectives in an editorial or thought-leadership article format rather than a short post.

Long-form, native articles increase the amount of time that followers browse and draw increased traffic to your LinkedIn page. When posting native content articles, we recommend highlighting the content with catchy headlines, concise and impactful messaging, related images, calls to action and relevant company news.

Long-form, native articles are an opportunity to showcase your agency and the expertise of your team.

### TOPIC IDEAS INCLUDE:

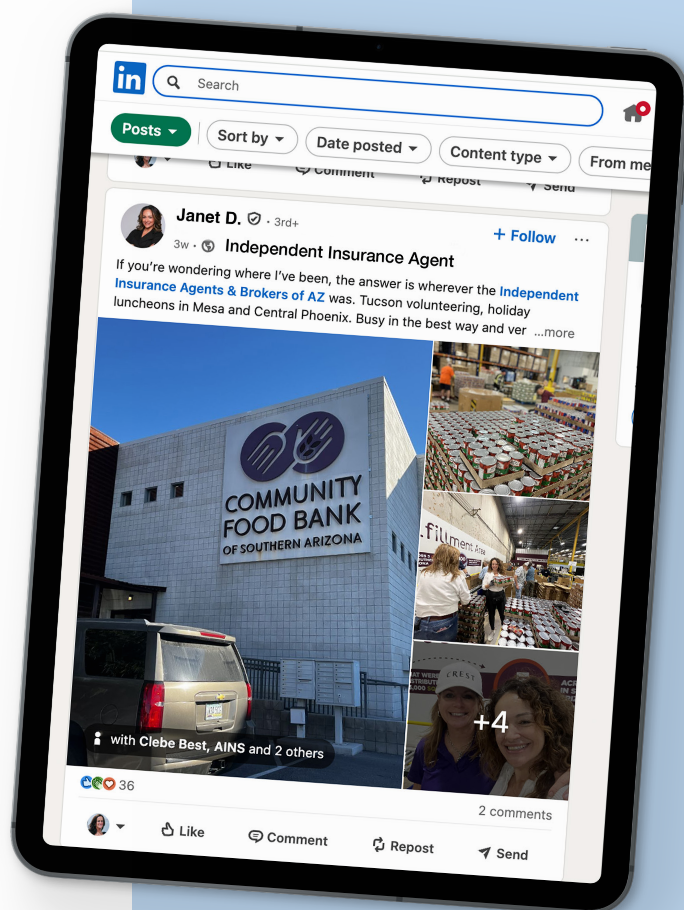
- Insurance compliance.
- Seasonal or locally relevant insurance tips to mitigate risks.
- Why choose an independent insurance agent over captive insurance agents?
- Common misconceptions or myths about insurance.
- Emerging trends in insurance.
- Pending or passed legislation that may impact the insurance industry.

# Sharing Photo and Visual Content

Putting a “face” or “personality” to a business or brand tends to be more relatable. By sharing pictures, videos and posts from team members’ personal LinkedIn pages, you can help drive more social media engagement to your business page.


### Ideas for photos and videos you might want to share on your business’s LinkedIn page are:

- **Team and Culture**
  - Photos or short video introductions of agents, their services and expertise.
  - Team member accolades, milestones, new hires, retirements and promotions.
  - Visuals that capture the office culture, such as holiday celebrations, team outings and continuing education.
- **Community involvement**
  - Photo or short video recaps from charity events, sponsorships, volunteerism or other initiatives that the agency participated in.
- **Agency Content and In-Office Visuals**
  - Visuals to celebrate awards, milestones, and certifications the agency has received.
  - Office expansion, relocation, and new services.
  - Post links to media mentions, press releases and upcoming events.
- **Testimonials**
  - Post video testimonial from client with their permission.
  - Cross-post positive reviews and write-ups that have been posted to Google.
  - Share case studies or client success stories.
- **Thought leadership**
  - Photos or short videos with coverage tips or an explanation of insurance concepts.
  - Branded visuals showing relevant data, trends, risk management, compliance or industry updates.



# Best Practices to Leverage LinkedIn Effectively

LinkedIn is more than just a social media or networking platform. When used strategically, it can serve as a powerful public relations tool that can strengthen your visibility as a professional independent insurance agent, amplify your agency's voice, strengthen client relationships and showcase your expertise in your field.

By maintaining an active presence on personal and business LinkedIn pages, sharing thoughtful, engaging content and making strides to communicate and connect with your network, you can position yourself as a thought leader and your agency as not only credible and knowledgeable but also unique in its ability to offer personalized service, standing out from captive agent competition. With each post, article and interaction, it's important to reinforce the authenticity, professionalism and value that independent insurance agents provide.

## BE CONSISTENT

» Maintain a regular posting schedule (at least once a week) to stay visible and top-of-mind.

» Use a mix of posts: text, links to articles, PDFs, polls, videos, and photos.

» Include calls to action like "click to learn more," "contact us," "read more at the link below."

## VISUALS

» Use high-quality images and well-lit videos.

» Keep videos under 2 minutes.

» Avoid using overly staged or stock image-heavy visuals (be authentic!).

» When sharing a photo or video, make sure to also include a short text caption or description describing its importance.

» If putting text on an image or video, make sure it is clear and easy to read.

## TEAM AND AGENCY

» Encourage team members to interact with the agency's posts on the business page (comments, likes, reactions, reshares, etc.).

» Always avoid sharing your clients' or agents' confidential or sensitive information (personal address, cell phone number, etc.).

» Ensure all content complies with industry regulations and professional ethical standards.

## ENGAGEMENT

» Respond to comments and questions on posts, as well as any direct messages.

» Ask questions or prompt opinions to foster topical discussions.

» Monitor engagement of posts using LinkedIn analytics and adjust your strategy for social media posting based on what performs best with your audience.

SECTION 5

# SPEAKING WITH THE MEDIA

# SPEAKING WITH THE MEDIA

Media interviews are an opportunity to share your expertise, highlight your agency and influence public understanding of independent insurance agents' roles in their communities. While they can feel intimidating, preparation and a clear approach will help you communicate confidently and effectively.

## Mindset and Preparation

How you approach an interview matters as much as what you say. Confidence, clarity and understanding of the process will set the tone for success. Remember that an interview is a conversation, not an exam–you're there to inform and engage.

## Before You Begin

- **Research the outlet, interviewer, and audience so you can tailor your delivery.**
  - A local TV station might want simple consumer tips: "Three critical things every homeowner should know about flood insurance."
  - A business journal might want insight into how insurance trends affect small business owners: "Why rising commercial premiums matter for Main Street."
  - A trade outlet might want deep expertise on specific industry issues: "How independent agents are navigating the hard market."
- **Ask about the setting, format and who else may be participating.** For example, is this a live segment? Is it being taped? Are there other experts being interviewed for the piece?
- **Request questions in advance if possible.** Let the journalist know you'd like to be as prepared as possible with the right points and ask if you can see the questions or general topics for discussion prior to the interview taking place. Some may provide the questions upfront, some may not, but it's always worth asking. Also, ask if they need anything beforehand, such as a headshot, photos or a video to accompany a segment, and provide it sooner rather than later.

## Keep in Mind

- **Don't be afraid:** Treat interviews as opportunities, not tests.
- **Reporters are people too:** Think of conversations as collaborative, not confrontational. They want useful, real-world insight—just like your clients do.
- **Guide the discussion:** Effective communication is about steering, not lecturing.
- **Never wing it:** Even experts need preparation and rehearsal before media interviews.

# Key Messaging

Going into an interview without a clear message is like starting a trip without a destination. Your key points will help you stay focused, no matter how the conversation develops. Limit yourself to two or three big takeaways that the audience should remember.

## USE THE 4 C'S

- **Clear:** Avoid jargon and explain ideas plainly. Example: Instead of "P&C coverage gaps," say, "homeowners may think they're covered for flooding when they're not."
- **Concise:** Stick to a few key messages. For instance, "Independent agents help clients compare coverage options, explain what's included, and advocate when claims arise."
- **Consistent:** Reinforce the Big "I" message that independent agents are trusted insurance advisors and community advocates.
- **Call to action:** Be explicit about what you want people to do. For example, "We encourage homeowners to contact an independent agent before storm season to make sure their coverage is up to date."

# Crafting Sound Bites

Reporters are always listening for short, memorable quotes that can be used directly in print, radio or TV. If you don't provide them, your key points may be lost or paraphrased. Preparing sound bites ensures that your message gets across clearly and quotably.

## TIPS FOR STRONG SOUND BITES:

- **Keep it short:** Aim for one sentence or less than 20 seconds.
- **Make it visual:** Use simple analogies or visual comparisons.
  - Example: "An umbrella policy is like an extra seatbelt—it protects you when the unexpected happens."
- **Focus on people:** Tie your point back to families, small businesses, or communities.
  - Example: "When a storm hits, independent agents are often the first call from families looking for guidance—not just coverage."
- **Be definitive:** Avoid hedging words like "maybe" or "kind of." Speak with confidence.
- **Repeat as needed:** Don't be afraid to restate your sound bite—reporters may circle back to it.

# During the Interview

Once the interview starts, your focus should be on delivery: staying in control and being calm and confident.

Use bridging techniques to guide the conversation back to your key points if it strays. Remember, you're building credibility and shaping how independent agents are perceived.

## Best Practices

### Stay in control

Use bridging phrases like:

- "What's important to note for policyholders is…"
- "The key takeaway for families shopping for insurance is…"

### Build your brand

Work your agency naturally into answers.

- For example, "The Smith Group supports families who live and work right here in our Anytown communities."

### Correct respectfully

Address inaccuracies with facts.

- For example, "It's a common misconception that auto insurance automatically covers rental cars. In fact (correct respectfully with facts)"

**Pause with confidence** Don't feel pressure to fill silence; let your points land.

### Keep it simple

Explain complex topics—like liability limits or cyber insurance—in everyday terms.

### Assume everything is on the record

From the moment you begin talking until you hang up the phone or leave the studio, what you say is quotable.

# Broadcast Tips

TV interviews add a visual dimension. Appearance, energy, and body language matter just as much as your words. Preparing in advance for format, setting, and timing will help you appear polished and confident on camera.

## PREPARATION

- Watch the program to understand its style.
- Ask about format details, such as whether you'll be sitting or standing, whether it's a solo interview or part of a panel, whether it's live or recorded, and the length of the segment. Practice your key messages and time your answers.
- Practice your key messages and time your answers. Think of "sound bites," such as "Independent agents are the only professionals who can shop multiple carriers for their clients," and "Insurance isn't one-size-fits-all, especially when it comes to small businesses."

## ON CAMERA

- **Clothing:** Wear solid colors, avoid distracting patterns or graphics and present yourself in a way that reflects your profession.
- **Body language:** Sit forward, avoid crossing your arms or fidgeting, and use natural gestures that don't block your face.
- **Eye contact:** Look at the interviewer, making eye contact — not the camera.
- **Energy:** Smile, speak slowly, vary your tone and show enthusiasm.

# Phone and Radio Interviews

Audio-only interviews demand clarity and composure. Without visuals, your voice and words must do all the work. Staying focused, slowing down and eliminating distractions will ensure your message comes through clearly.

## KEY TIPS AND BEST PRACTICES

- Speak slowly and repeat key points if needed because reporters may be typing as you talk.
- Keep your notes nearby, but avoid sounding like you're reading.
- Find a quiet, distraction-free space and turn off electronics.
- Use consumer-friendly examples to illustrate your points. For instance, "Insurance is like a toolbox—you need different tools for different problems. Independent agents help make sure you've got the right ones before something breaks."
- Get the reporter's contact info for follow-up. While you won't preview the story, you can share materials like consumer tip sheets or Big "I" resources afterward.

# Final Takeaways

Every interview is a chance to educate, inform, and advocate for independent agents. Success comes down to preparation, clear messaging, and confident delivery.

- **Prepare:** Know your audience, outlet, and format.
- **Message:** Stick to clear, concise, consistent talking points.
- **Delivery:** Stay calm, redirect when needed, and avoid jargon.
- **Professionalism:** Assume everything you say and share is on the record and follow up promptly.

SECTION 6

# BUILDING STRONG MEDIA RELATIONSHIPS

# BUILDING STRONG MEDIA RELATIONSHIPS:

## The Foundation of Effective Communication

How you engage with journalists directly influences how your story is told. Strong media relationships are built on trust, transparency, and mutual respect, not transactions. This section offers eight key ways to foster strong relationships with media partners.

# EIGHT WAYS TO BUILD STRONG, MUTUALLY BENEFICIAL RELATIONSHIPS WITH THE MEDIA

1. **Start with Understanding, Not Asking**
   Before reaching out to a reporter, take the time to understand their beat, publication, and audience. Read their recent stories, note their tone and approach, and identify where your message naturally fits. Journalists are far more receptive when they see you've done your homework and value their expertise.

2. **Be a Resource, Not a Pitch Machine**
   Great media relationships are built when you offer insight, not just promotion. Be available as a subject matter expert, share useful data or background context, and connect reporters with additional sources when appropriate. When you become a trusted resource — not just someone looking for coverage — reporters will keep coming back.

3. **Respond Quickly and Respect Deadlines**
   In the news cycle, timing is everything. Responding promptly — even if only to say, "I'm checking and will get back to you shortly" — builds credibility. Missing deadlines or delivering incomplete information can damage trust and make journalists less likely to reach out in the future.

4. **Tell Authentic, Compelling Stories**
   Facts inform; stories inspire. Rather than leading with corporate jargon or statistics, focus on human impact. Who benefits from your work? What problem are you solving? Why does it matter now? Journalists are storytellers; help them tell one worth sharing.

5. **Be Transparent and Honest**
   Credibility is everything. If you don't have an answer, say so. If something goes wrong, address it openly. Trying to spin or obscure the truth may protect you in the short term, but it damages relationships and reputations in the long run.

6. **Stay in Touch Between Stories**
   The best media relationships are ongoing, not just reactive. Share occasional updates, new data, or thought leadership pieces even when you're not seeking coverage. Congratulate reporters on strong stories, or share insights that might help with future coverage. Consistency, not constant pitching, keeps you on their radar in a positive way.

7. **Respect the Independence of the Press**
   Remember: the media's job isn't to promote you, it's to inform the public. Respecting their editorial independence strengthens credibility on both sides. A reporter may follow up for fact-checking, but don't ask to see a story in advance.

8. **Show Appreciation**
   When someone covers your company or story fairly and accurately, acknowledge their work. A short, sincere note of appreciation goes a long way in building goodwill.

## THE BOTTOM LINE

Building meaningful relationships with the media isn't about control, it's about connection. The most effective communicators see journalists not as adversaries or gatekeepers, but as partners in storytelling.

SECTION 7

# EFFECTIVE EVENT PARTICIPATION & PROMOTION

# EVENT PARTICIPATION & PROMOTION

Effective event participation—whether you're attending or hosting—is one of the most powerful ways for agencies to demonstrate expertise, engage with clients and strengthen community presence.

When approached strategically, events don't just raise visibility, they build relationships, generate leads and reinforce trust in your brand. With thoughtful planning, execution and intentional follow-up, every event has the potential to deliver meaningful, measurable results.

# Attending Events

The right events align with your agency's goals, target market and growth strategy. Begin by identifying opportunities, evaluating their business fit and securing participation through timely registration or application.

## Identify Potential Opportunities

- **Industry-focused:** Conferences, trade shows, and professional seminars that allow your agency to connect with peers, carriers, and potential partners.
- **Community-focused:** Local fairs, school fundraisers, youth sports leagues, and charity 5Ks are powerful ways to show your agency's commitment to the neighborhoods you serve. Sponsoring a team, staffing a table, or volunteering demonstrates that your agency is an invested local business—not just a service provider. These events create authentic touchpoints with families, homeowners, and small business owners.
- **Business development opportunities:** Local business expos, industry events, or association gatherings that build relationships, uncover referral partnerships, and connect your agency with prospective clients.
- **Educational or awareness events:** Workshops or presentations that position your agency as a trusted resource on topics such as risk management, disaster preparedness, or insurance coverage gaps.

## Where to find events

- State and regional trade associations, including Big "I" state associations.
- Local chambers of commerce or small business networks.
- School districts, PTA calendars, and youth sports leagues.
- Local nonprofit organizations and community centers.
- Municipal, county, and regional business or community calendars.
- Professional networking platforms such as LinkedIn and industry lists.
- Community-focused social media groups, such as neighborhood Facebook groups, local event pages or Nextdoor listings.

## Apply or Register

A well-prepared application or sponsorship proposal signals professionalism and can help your agency stand out.

- **Review requirements:** Note deadlines, participation fees, sponsorship tiers and any required materials.
- **Prepare assets:** Have updated agency descriptions, spokesperson bios, logos and marketing materials ready.
- **Communicate your value:** Be specific about what your agency contributes and how attendees will benefit from your participation.
- **Include a brief case study or data point:** When applicable (e.g., "Our agency helped 50+ small businesses improve flood preparedness last year") to make your application more compelling.

## Evaluate Strategic Fit

Before committing, assess whether an event aligns with your desired outcomes and provides a strong return on investment:

- **Audience alignment:** Are attendees potential clients, referral partners or decision-makers?
- **Brand visibility:** Will your agency have opportunities for signage, speaking roles or exhibitor booths?
- **Engagement potential:** Can you capture leads, distribute materials or share your expertise?
- **Community connection:** Will your presence reinforce your agency's role as a local partner helping families and small businesses?

# Hosting Events

Hosting your own event positions your agency as a proactive, expert resource while giving you full control over the content, audience and brand experience. Thoughtfully executed, hosted events can drive new leads, deepen client relationships, and strengthen your agency's credibility in the community.

## Define Your Purpose

### Start with clear business objectives:

- ✓ Educate clients and prospects on timely insurance topics.
- ✓ Strengthen relationships with high-value clients or referral partners.
- ✓ Build your agency's community ties by hosting events that bring local families and businesses together around shared goals like safety, preparedness, or education.
- ✓ Generate leads and identify new business opportunities.

## Choose the Right Format

Select a format that aligns with your audience and goals:

- **In-person:** Seminars, workshops, community safety days, or client appreciation events.
- **Virtual:** Webinars, Q&A sessions, or livestreams for clients who prefer to join remotely.
- **Hybrid:** Combine in-person and virtual participation to maximize reach.

## Build Partnerships

Collaborate with organizations that enhance event attendance or your event's overall credibility.

→ **EXAMPLE:** Co-host a "Home Safety & Insurance 101" workshop with the local fire department to attract engaged prospects while highlighting your expertise.

## Make It a Tradition

Consider developing signature or recurring events—like an annual "Winter Preparedness" seminar or "Family Safety Day"—so clients, prospects and community members come to expect and look forward to your programming each year. This consistency reinforces your agency's reputation as a reliable and knowledgeable industry resource.

# Event Execution

This section applies to both attending and hosting events. It consolidates the steps to prepare, engage, and follow up efficiently.

## Event Promotion and Pre-Event Preparation:

Effective promotion and thorough preparation are the foundation of a successful event. Coordinated marketing, media outreach, and team readiness not only maximizes attendance but also positions your agency as a trusted advisor in the community.

By planning ahead and aligning every detail with your agency's brand and expertise, you ensure a seamless, professional experience that leaves a lasting impact.

## Media Outreach

Engaging the media amplifies your event's visibility and helps establish your agency as a thought leader. Here are two common media outreach techniques:

### Press Releases:

Best to use for major announcements, sponsorships, or community-focused initiatives. Include quotes, critical event details, and high-resolution images.

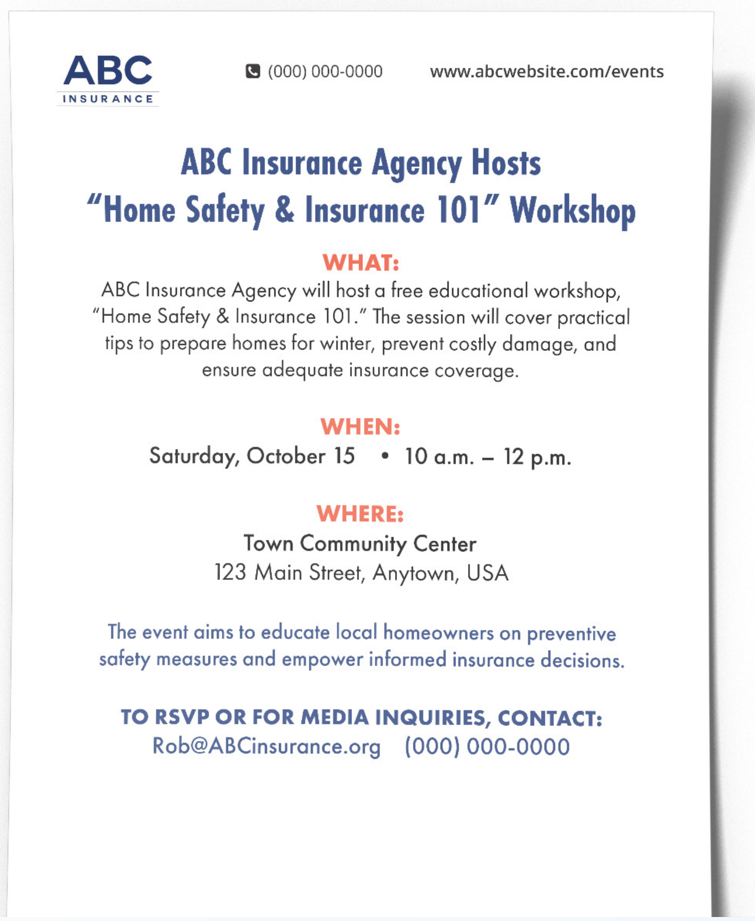
### Request for Coverage:

For most events, a concise, one-page notice (called a 'Request for Coverage') that clearly outlines the Who, What, When, Where, and Why is the most effective way to keep journalists informed and engaged.

**WHAT TO INCLUDE:**

- **Headline:** Clear and descriptive, such as "ABC Agency Hosts Free Workshop on Home Safety & Insurance."
- **Subhead:** Optional supporting line, such as "Community event to educate families on protecting their homes this winter".
- **Event details:** Who, what, when, where and why.
- **Contact info:** Name, phone and email for follow-up.

Example Request for Coverage ↓


ABC INSURANCE

(000) 000-0000 www.abcwebsite.com/events

**ABC Insurance Agency Hosts "Home Safety & Insurance 101" Workshop**

**WHAT:**
ABC Insurance Agency will host a free educational workshop, "Home Safety & Insurance 101." The session will cover practical tips to prepare homes for winter, prevent costly damage, and ensure adequate insurance coverage.

**WHEN:**
Saturday, October 15 • 10 a.m. – 12 p.m.

**WHERE:**
Town Community Center
123 Main Street, Anytown, USA

The event aims to educate local homeowners on preventive safety measures and empower informed insurance decisions.

**TO RSVP OR FOR MEDIA INQUIRIES, CONTACT:**
Rob@ABCinsurance.org (000) 000-0000

# Social Media Event Promotion

Promote your event across social platforms to build awareness and engagement:

- **Pre-event:** Announce event details, tag partners, and post countdowns.
- **During the event:** Share photos, live updates, and key takeaways.
- **Post-event:** Post thank-yous, highlight successes, and link to media coverage.

## Sample Posts:

> “Join us this Saturday for our free ‘Protect Your Home’ workshop! Learn from our agents and local experts. Register here: [link]”

> “We had a fantastic time at the ABC Business Expo today! Thanks to everyone who stopped by our booth to talk about the best ways to protect your home this winter.”

## Social Promotion Best Practices:

→ **Use consistent hashtags**—both your own, such as #ABCAgency, and local or event-specific ones—to increase visibility.

→ **Tag any partners,** key figures or locations in your posts, especially if they have a larger social network and following.

→ **Coordinate** social media posts with your press outreach for maximum reach.

# Pre-Event Preparation

Building on your promotion and media efforts, thorough pre-event preparation ensures your team delivers a polished, professional experience.

## Develop marketing materials:

Create consistent, on-brand materials that communicate your agency's value and help promote your event across multiple channels:

- **Printed collateral:** Design brochures, flyers, or handouts featuring your agency logo, event details, and key takeaways. Provide guides or checklists attendees can reference after the event to reinforce your expertise.
- **Digital assets:** Incorporate QR codes that link directly to your website, service pages, or downloadable resources. Prepare branded slide decks for presentations and short educational videos to preview event topics.

## Prepare Your Team

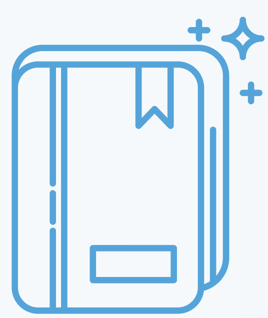
A confident, well-prepared team ensures smooth execution and consistent messaging:

- **Assign roles:** Designate an event lead, presenter or moderator, social media contact, and follow-up coordinator.
- **Align messaging:** Review key talking points, FAQs, and potential client questions to ensure confident and consistent communication.
- **Rehearse:** Conduct a brief run-through if staff will be presenting or demoing. This helps refine timing, flow, and comfort with materials.

## Best Practice: The Day-Of Binder

Assemble a comprehensive day-of binder or shared digital folder that includes:

- Event agenda and schedule.
- Staff assignments and contact info.
- Media talking points & press materials.
- Guest lists and RSVP status.
- Extra business cards and promotional materials.



Having all essential information in one place allows your team to stay organized, professional, and ready to handle any last-minute questions or opportunities.

# On-Site Execution

On-site preparation goes beyond logistics—it's about creating an engaging, branded experience that reinforces your expertise and fosters meaningful connections.

## Branding and Visuals

First impressions matter. Make your space welcoming, organized, and clearly aligned with your agency brand:

- **Signage and displays:** Use banners, tablecloths, or a step-and-repeat featuring your agency logo, tagline, and branding.
- **Consistent branding:** Ensure all printed materials, handouts, and digital assets carry a unified visual identity.
- **Clean layout:** Arrange tables, seating, and activity areas to maximize flow and accessibility.

## Networking and Media

Maximize your presence and visibility at an event through strategic personal interactions and media engagement:

- **Staff interaction:** Encourage team members to circulate, introduce themselves and engage in meaningful conversations with attendees.
- **Media capture:** Designate a team member to take photos, short videos and behind-the-scenes content for reporters, social media and post-event follow-up.
- **Media preparedness:** If reporters attend, have a designated spokesperson ready with talking points, prepared soundbites, and key messaging.

## Presenting at an Event

First impressions matter. Make your space welcoming, organized, and clearly aligned with your agency brand:

- **Know your audience:** Tailor your presentation content to attendees' needs, concerns, and knowledge level.
- **Keep it concise:** Focus on three key takeaways per session; avoid information overload.
- **Engage participants:** Invite audience questions, provide real-life examples, or offer interactive discussion points. Explicitly leverage storytelling opportunities to highlight client success stories, case studies, or community impact.
- **Use visuals wisely:** Incorporate clear slides, handouts, or props to support key messages, not overwhelm them.
- **Practice timing and flow:** Rehearse your presentation content and timing to maintain a smooth, confident delivery.
- **Be approachable:** Encourage conversation before and after the presentation to deepen connections with the audience.

# Post-Event Follow-Up

The work doesn't end when the event does. Thoughtful follow-up strengthens relationships, reinforces your agency's expertise, and maximizes the ROI of your event.

## Lead Nurturing

Prompt and personalized follow-up is key to converting attendees into clients or partners:

- **Timely contact:** Reach out to all attendees within 3–5 days while the event is still fresh in their minds.
- **Personalized follow-up:** Send thank-you emails, provide valuable resources, and suggest next steps.
- **Relevant Content:** Share downloadable guides, checklists, or tip sheets relevant to the event topic, such as, emailing "Top 5 Auto Insurance Tips" to attendees of an auto insurance workshop.

## Media Outreach

Extend your event's visibility by keeping the media informed and tracking participation:

- **For attending media:** Provide photos, quotes, and key materials promptly so they can meet publication deadlines.
- **For non-attending media:** Share post-event highlights, images, and quotes, or issue a post-event press release to maximize potential coverage.
- **Track participation:** Note which media attended and which responded but had a scheduling conflict to inform outreach strategies for future events.

## Measure & Record Success

Evaluating your event helps improve future efforts and demonstrates measurable results:

- ✓ **Track metrics:** Record attendance, new contacts or leads, social media engagement, and any media coverage.
- ✓ **Document insights:** Capture lessons learned, best practices, and areas for improvement to guide future events.

## Outcome

By thoughtfully selecting and engaging in events—both industry-wide and community-based—Big "I" members can strengthen client connections, expand brand recognition, and showcase their expertise. Whether it's a national trade conference or a neighborhood 5K, every event is an opportunity to demonstrate your agency's role as a trusted advisor and active member of the community.

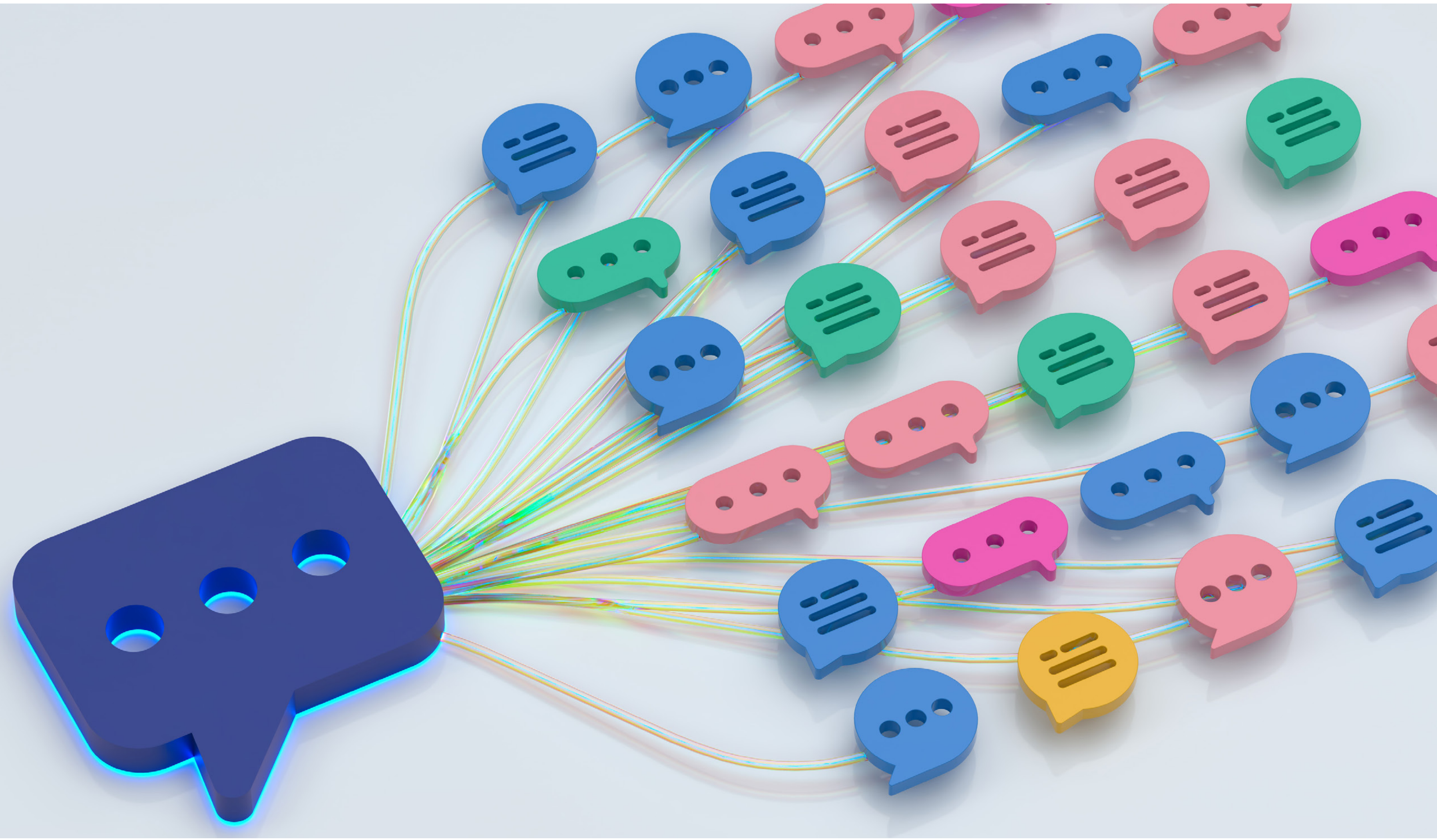
SECTION 8

# MAXIMIZING MEDIA COVERAGE

# MAXIMIZING MEDIA COVERAGE

Amplifying earned media coverage is essential because it extends the reach and impact of credible, third-party validation after the initial publication.

When a news outlet or influencer highlights your work, it carries far more weight than self-promotion alone. Earned media builds trust and reinforces your message through an independent lens.



## Website Posting

Once media coverage has been secured, it's important to promote it across all of your business's platforms to increase its visibility and reach.

This includes the website set up for your independent insurance agency. Consider creating a "News," "In the News," or "Media Coverage" section on your website where all the backlinks to your media coverage can live, allowing people to sort through and view each clip easily. When listing each piece, include a brief description or headline, date of publication and the link.


## Social Media Sharing

Other platforms to consider sharing your media clips on include your business social media pages, such as LinkedIn, Facebook, Instagram, and X. When posting, include a short caption explaining the context of the piece, the outlet that published it, and its newsworthiness.

Also, use relevant hashtags in posts, such as #InsuranceAgent, #IndependentInsurance. To increase visibility of the post, tag the publication and reporter when possible. Only video and image clips should be posted to Instagram, as it is a visual-forward social media platform. When posting videos, the clips should be short, about 15-30 seconds in length.

## Email Newsletters

An email newsletter can be a great way to share your agency's media coverage, as well as any news or important updates with your professional network, clients and prospects. A well-crafted e-newsletter can keep your business top-of-mind, drive traffic to your website to boost SEO and provide consistent value to subscribers.

When including media coverage in an e-newsletter, list it towards the top to draw immediate attention. Include a brief, eye-catching headline, such as "Our Agency Featured on Local News Channel," or "Agents Recognized as Top Industry Leaders in Trade Publication." Include a brief 1-2 sentence description of the media hit and its newsworthiness. Either program a clickable "Read More" or "Watch Here" button or hyperlink the words to click through to the full article or video clip. Consider including a graphic image—either a thumbnail photo, outlet logo or screenshot from the video clip—as long as it is clear, properly credited or allotted permissions, and sized adequately for email.

# CONCLUSION

In today's competitive marketplace, visibility and credibility go hand in hand. Public relations isn't just an optional add-on—it's a powerful complement to your marketing strategy that helps shape perception, build trust, and keep your agency top of mind.

By integrating PR into your overall mix, you can amplify your message, highlight your expertise, and strengthen relationships with both your clients and your community. The result is a more resilient brand and a stronger foundation for long-term growth.

### How the Big "I" can help:

- ✓ Connect with your state association to collaborate.
- ✓ Access media materials including, editorial calendars, template pitches, and media lists.
- ✓ Connect with the Big "I"'s PR partner, Rosen Group, to learn about their PR services.

PR Toolkit for Independent Agents

# THANK YOU

VISIT

trustedchoice.independentagent.com