

YOUR 30-DAY SEARCH VISIBILITY HOMEWORK

A practical take-home plan for P&C insurance agencies

Your goal: Make your agency easier to find, give prospects reasons to trust you, and help them understand the expertise you bring.

Use this checklist after the webinar. The two items completed during the session are already checked off. Work through the remaining tasks over the next 30 days.

WEEK 1 — GET FOUND & GET READY

- ☒ Update your Google Business Profile (GBP). (DONE DURING WEBINAR)
- ☒ Find and save your direct Google review link somewhere your team can access it. (DONE DURING WEBINAR)
- ☐ Choose the person responsible for keeping your agency information current.
- ☐ Choose 2–3 customer moments when your team can naturally ask for a review (for example, after solving a problem or completing an annual policy review).

WEEK 2 — CLEAN UP YOUR DIGITAL FOOTPRINT

Audit your agency's top listings. You don't need to be everywhere; the goal is to be accurate and consistent wherever you are listed.

- ☐ Audit your Google Business Profile, Bing Places, Apple Business Connect and agency website.
- ☐ Check Facebook and LinkedIn, plus relevant industry/association, chamber, carrier/partner and insurance/business directories.
- ☐ Check each listing for the correct business name, address/service area, primary phone number, website and services.
- ☐ Update outdated phone numbers, addresses, website links, business names or descriptions.
- ☐ Identify duplicate listings and resolve them where possible.
- ☐ Document the changes so your agency can maintain accurate information.

Quick consistency check: NAME + ADDRESS + PHONE + WEBSITE + SERVICES

WEEKS 3–4 — ADD EXPERTISE

Turn the questions your customers already ask into clear, useful website content that reflects your agency's real experience.

- ☐ Choose one real question from a customer email, call or conversation.
- ☐ Remove personal information (PII) and confidential details before using AI or sharing the question.
- ☐ Draft a clear FAQ answer with AI, then have an insurance professional review it.
- ☐ Add agency-specific experience, examples and nuance; verify the answer before publishing.

☐

Publish one FAQ on your website.

☐

Publish one additional piece of original content based on your agency's knowledge.

☐

Begin asking for reviews consistently at the customer moments you identified.

☐

Add selected review excerpts, testimonials, case studies or customer stories to your website where appropriate and with proper permissions.

☐

Choose one recurring process your team will continue after the 30 days.

YOUR FINISH-LINE CHECKLIST

Check each item when it is complete. Aim for five specifications and repeatable process—not a notebook full of ideas.

FINDABILITY

- ☐ Google Business Profile updated (completed during webinar)
- ☐ Top listings audited
- ☐ Inconsistent information fixed
- ☐ Duplicate listings addressed

CREDIBILITY

- ☐ Google review link saved (completed during webinar)
- ☐ Review request moments and process established
- ☐ Reputation shown beyond Google where appropriate

EXPERTISE

- ☐ One FAQ based on a real customer question added to the website
- ☐ One original piece of content published
- ☐ Customer proof incorporated where appropriate

MY NEXT ACTIONS

1. My first task after the webinar: _____

2. Person responsible: _____ Target date: _____

3. One process we'll make repeatable: _____

Remember: Findability. Credibility. Expertise. Build the signals that make your agency useful wherever prospects search.

Agency: _____ Date started: _____