

GUIDING BROKERS



Insurance Brokers' Standards Committee

**Sample Marketing & Sales Plan**

Rolling activity plan

Rolling Sales and Marketing		Business Name (insert)																			
Activity	J	A	S	O	N	D	J	F	M	A	M	J	Type	Market Size	Target Leads	Target Sales	Target GWP	Target Income	Marketing Cost	Inc per £ spent	Comments
Local Manufacturing	■	■		■			■			■			Appt Making	300	75	15	150000	30000	3000	10	Data cleansed. Telemarketing firm to be sourced
Win Backs	■											Email and Call	500	300	60	90000	15000	0	15000	Team to email and follow up call	
ABC Affinity Campaign				■									Campaign	40000	2000	200	100000	20000	8000	2.5	Direct Mail and pay away
Quote Zone - Segment			■					■					Pay Per Click	25000	1000	250	250000	75000	10000	7.5	Landing Page built. Leads to be purchased ad hoc
Referrals	■											Personal Request	480	240	120	120000	24000	0	24000	Handlers targeted to get 10 per month	
Specialist Trade Shows		■							■				Event	100	40	20	200000	40000	10000	4	Combined events with local H&S Firm
D&O Campaign		■			■				■				Cross Sales	5000	2000	500	100000	30000	0	30000	Mid term call to all Ltd Co Clients
Introducer				■							■		IAR Referrals	25	10	2	100000	30000	15000	2	Establish 2 new Introducer relationships (pay-away)

Responsibility	
Person 1	■
Person 2	■
Person 3	■
Person 4	■
All	■