



Insurance Industry Case Study

Insurance Agent Expanded Client Base in Competitive Personal Insurance Industry

Introduction

In 1993, John Stewart began his career in the insurance and financial fields. With extensive training in Tax Free Retirement Strategies, debt elimination, and life and health insurance concepts, John moved into the property and casualty fields in 1996. He has experience with over 15 different property and casualty carriers, including Farmers Insurance. John sought to increase revenue using direct mail and realized a 545% return on investment (ROI).

The Challenge

Because of John's personal insurance background, he had many loyal clients. He was not quite where he wanted to be in terms of revenue. Then Farmers Insurance put out revenue incentives for their agents if they could reach a certain threshold. This "incentive" was just the push John needed to add strategic marketing to his business. He contacted a fellow Farmers agent in Texas for advice. The agent told him that whenever he needs a boost in his numbers, he uses postcards to reach out to prospective clients.

The Strategy

John used a company to help him design a mail campaign, which included automatic online follow-up (banner ads) that matched the design of the postcard. The service also came standard with call tracking and mail tracking. Based on the proven success of other insurance cards, they came up with a design that included key factors such as an image of the agent, a compelling offer (iPad), and gripping testimonials. John created a custom-tailored mailing list for his campaign. He chose very specific subdivisions in his area that he knew were prime prospects for his services. The campaign included 24,000 postcards to be sent out in 4 mailings of 6,000 each.

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John helped me out when I wasn't with Farmers. He is the best agent I've ever had. —Charles E.

John's help goes far beyond insurance. He even helped me ship and wax the floors at my practice. —Dr. Gerald S.

FARMERS INSURANCE

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The Results

John secured about five new customers with every mailing, resulting in about 60 additional policies. John spent \$11,000 on the campaign and generated in one year \$60,000 in revenue, for a campaign return on investment of 545 percent. The ROI reflects just the clients' first year with John; the ROI will continue to grow each year that these clients continue to use them as his insurance agent.

Case Study Provided by [Direct Mail Marketing](#) Company:



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