

I. Review of Initial GPT3 Journey Map and GPT4's Marketing Response Plan; Intro to CRM-inclusive adaptation

A. Content is Everything

1. Intelligently written, focused content can act as a filter for inbound marketing to middle and upper market clients

a. Inbound marketing is necessary to work with some interface platforms for many CRMs, and is statistically more profitable (costs 61% less, yields 3X more¹)

b. High level content establishes you as a thought leader; decision makers have cited a company's customized-for-them content as proof of a relationship-oriented business model² ("Statistics and Stories")

2. Editorial calendars and content distribution templates for each discipline

a. Content is best written professionally, in house or outsourced

b. Website content library is still necessary, to catch "strays" or offer more options for producers when the interaction goes outside the established path

B. Producer responsibilities

1. Reasonable time frames for contact (1-3 days, 3-5 attempts)

II. Encouragement of Adoption by Producers

A. Incentivize Adoption

1. Statistics about sales with a CRM: "This is how you reach the top numbers"

2. Tangible incentives

B. Streamline as much as possible (HBR; less tools = more job satisfaction)

III. Answers to Additional Questions

¹ <https://www.impactbnd.com/blog/35-stats-that-prove-the-roi-of-inbound-marketing>

² <https://www.marketingcloud.com/blog/50-content-marketing-stats/>

"Jenny" Employee Benefits	Awareness	Research	Engagement	Execution	On Board & Nurture
Goals	Establish benefit reqs., identify sources	Determine resources, broker trustworthiness and fit	Gather and submit info	Determine best carrier and plans	Develop loyal relationship
Motivation & Pain Point	Attract /retain employees, cost increases, ACA reqs.	Minimize biz disruption, speed, difficult questions	May not have everything, time/money constraints	Long term partnership, lots of moving parts	Competent broker with many tools is an advantage
Emotions	Annoyed, overwhelmed	Frustrated, uncertain	Cautiously optimistic	Encouraged, relieved	Confident, optimistic
Influences	HR Director, CFO, President	Competing broker	Staff, CFO	Business partners	Account management staff, producer
Questions	How long will it take? Cost? How are you different?	Do you understand my business? Can I trust you?	Is change worth it? What support will we get?	Customizeable? How do I get what I need?	
Needs/Wants	Simplicity, reasonable cost, comfort with provider	Easy to understand and implement	Minimal biz disruption, clarity	Timeliness, accuracy	
Humalogy & Technology	Google search, email, social media	Email, industry groups on LinkedIn, advisors	In person meet, phone call	email, enrollment meetings	email, in person interaction
Content		Letter of recommendation, current customers	Follow up email, BOR letter	Set up Zywave email drip, contracts and paper work	Financial analysis, monthly webinars
Data We Collect and/or Earn	Contact info, biz details	other agencies' involvement, owner's willingness	Financial info, company background	Contracts, agreements, benefits guide	Continuous and timely updates

Addressed by Content

"Jenny" Employee Benefits	Awareness	Research	Engagement	Execution	On Board & Nurture
Goals (Met by Content)	Introductory email with opt-in link to landing page	Second personalized email with links, infographics	Video testimonials, questionnaires	CRM allows viewing of all contact w/account managers, etc.	Streamlines reminders for renewals, other deadlines
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