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From Brand Basics to Marketing Momentum

A Guide to **Branding & Marketing**
Your Insurance Business

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Your brand is the promise
you make to your clients.

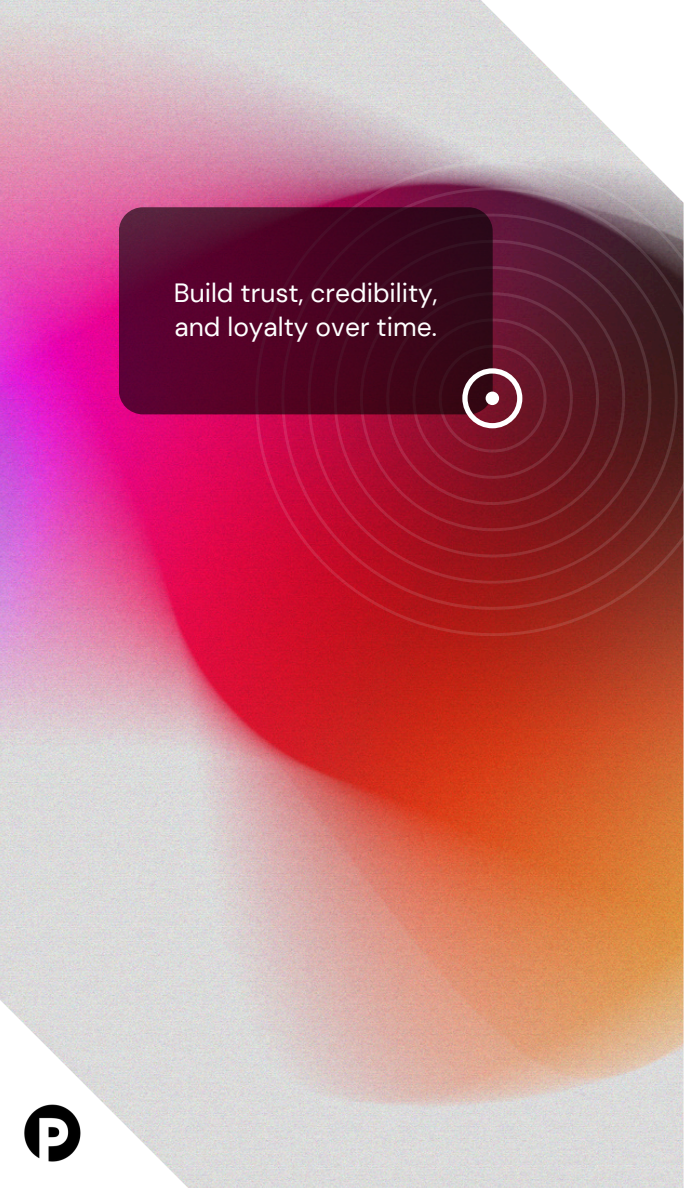


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Laying the Foundation



Build trust, credibility,
and loyalty over time.

Laying the Foundation

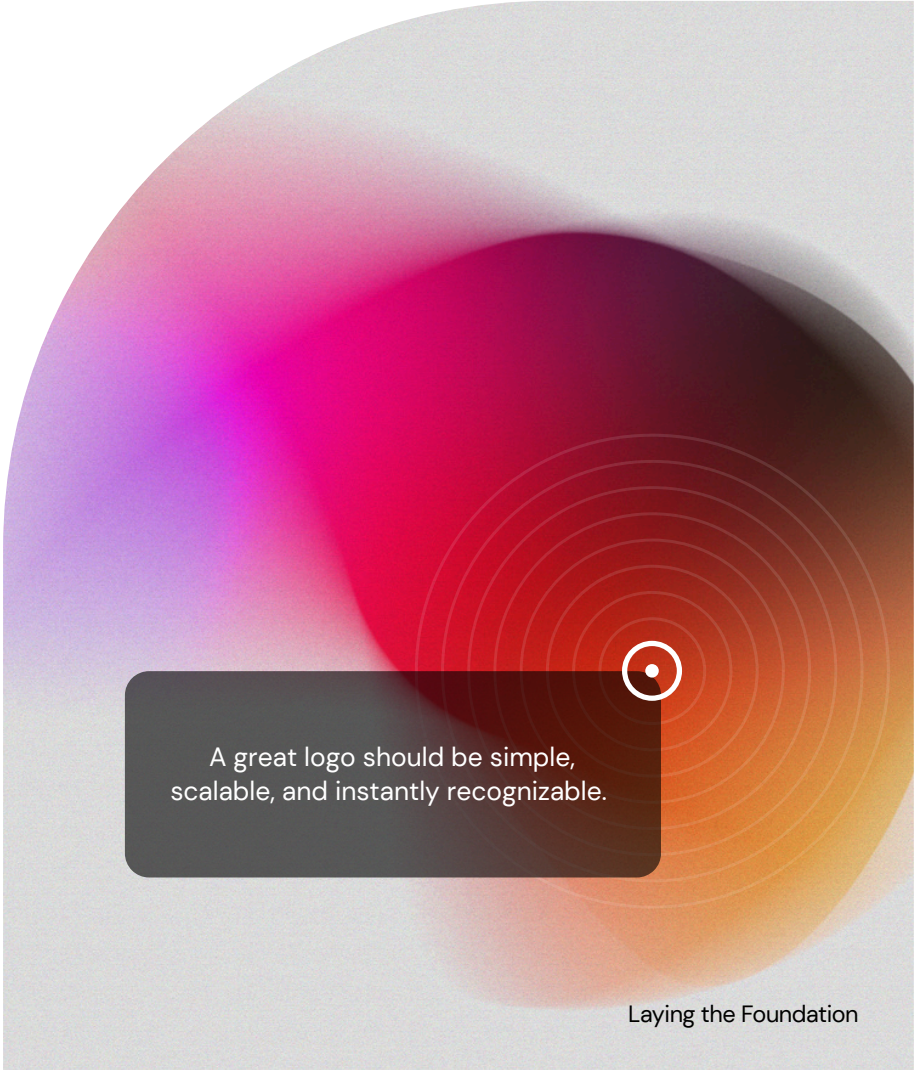
Your Logo, Brand Identity & Mission

- Why first impressions matter
- Logo: clean, modern, memorable
- Color palettes, typography, and brand tone
- Crafting a core mission and value proposition
- Building trust through consistency



Why First Impressions Matter

Your logo is more than just a graphic —**it's the face of your brand**. In a crowded insurance market, first impressions can determine whether a potential client keeps scrolling or stops to learn more.



A great logo should be simple, scalable, and instantly recognizable.

Logo: Clean, Modern, Memorable

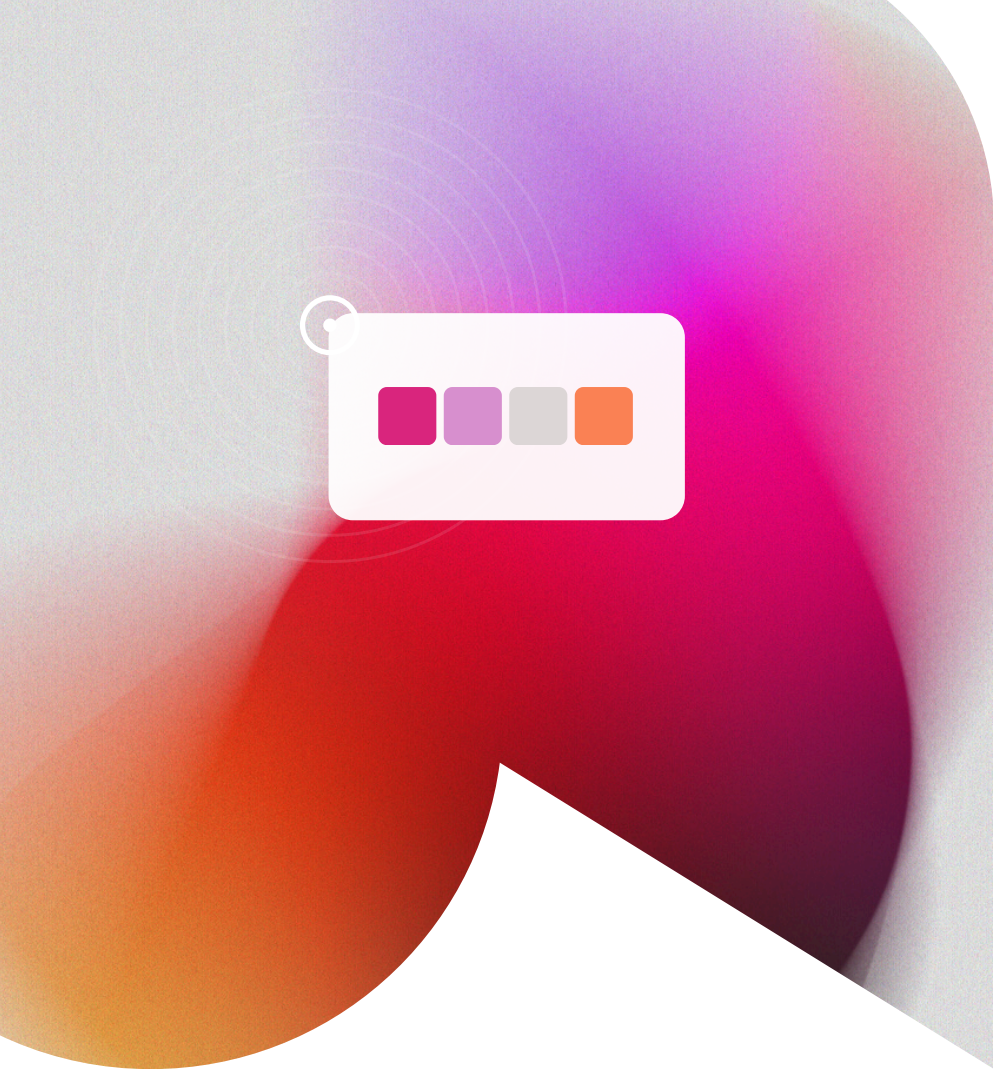
A **clean look** ensures versatility across digital and print. A **modern edge** keeps you current and credible. And a **memorable design** means your brand sticks in people's minds long after the first glance.

Color Palettes, Typography, and Brand Tone

More than design choices —
these are the **building blocks of
your brand identity.**

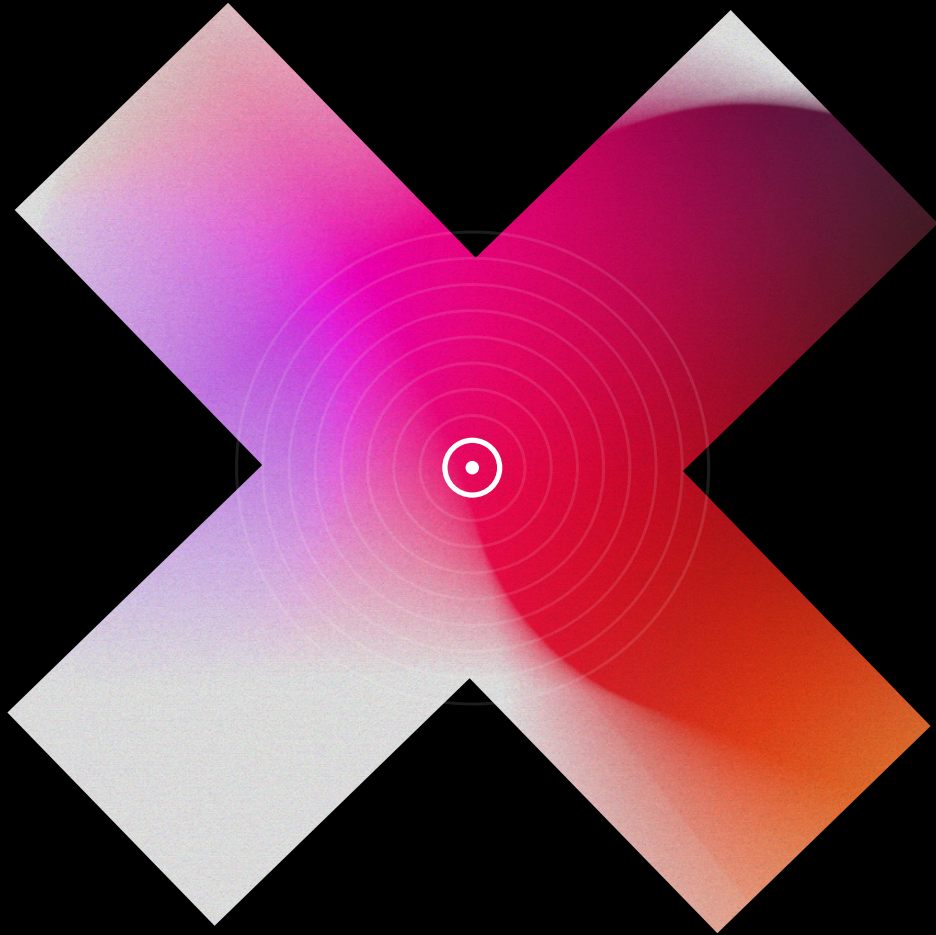


Use the same fonts, colors, and
tone across every platform.



Color Palettes

Your color palette sets the mood before a word is read. Whether it's **bold and energetic** or **calm and trustworthy**, the right colors create emotional connection and brand consistency across every touchpoint.



Typography

Typography does more than deliver information — **it delivers personality.** Sleek sans-serifs suggest innovation. Refined serifs speak to tradition and reliability. Choose fonts that complement your voice and enhance readability across platforms.



Brand Tone

Your brand tone **shapes the voice of your business**. It's the personality behind every message, email, and social post.

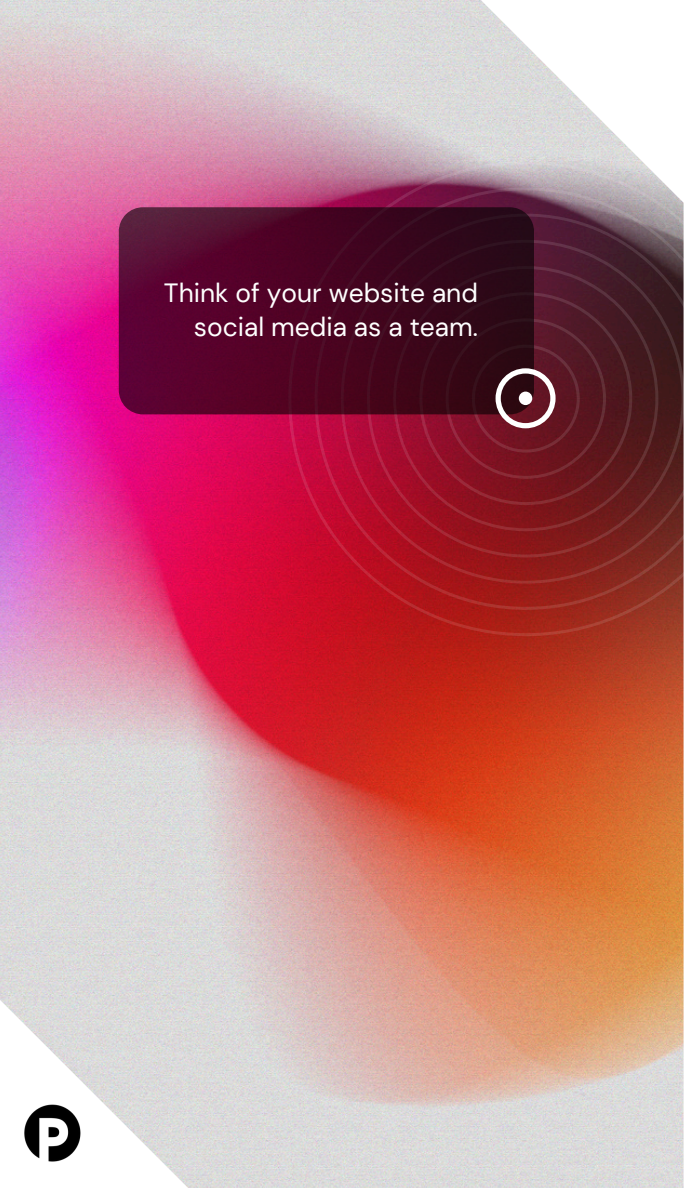
Whether you're aiming for friendly and approachable, professional and authoritative, or bold and energetic, a **consistent tone builds trust and recognition**.

It's not just what you say
— it's how you say it.





Creating Your Digital Home



Think of your website and
social media as a team.

Creating Your Digital Home

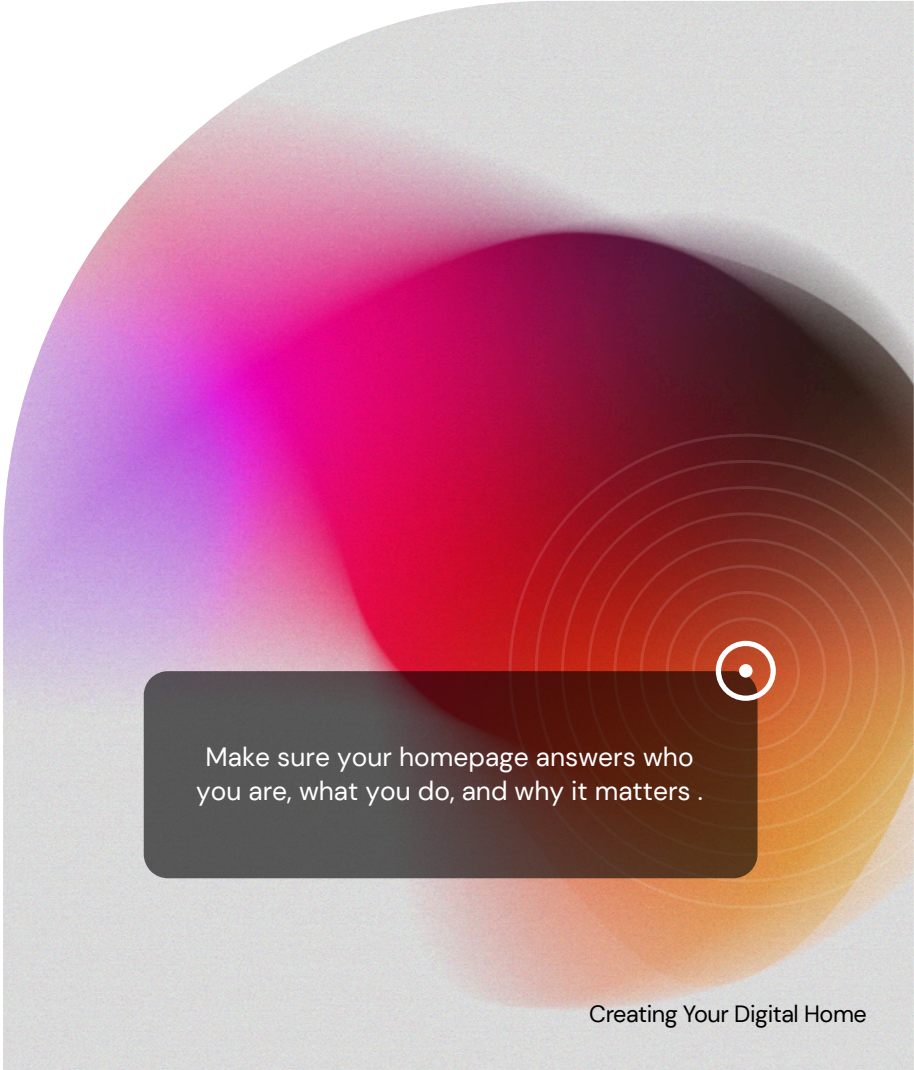
Website & Social Media Presence

- Your website = your storefront
- Services listed with clarity
- Social media platforms that matter
- Posting with purpose: value vs. volume
- Consistent branding across platforms



Your Website = Your Storefront

Before anyone calls, emails, or buys — they visit your website. That makes it your digital first impression, and it needs to do the heavy lifting.



Make sure your homepage answers who you are, what you do, and why it matters .



A Great Site Should:

- Look professional and polished
- Load fast and work on any device
- Guide visitors clearly to take action
- Reflect your brand's personality and value

Just like a storefront, it should be clean, inviting, and built to convert walk-ins into loyal customers. Your website isn't just a presence — **it's a powerful sales tool.**



First impressions
online are everything.

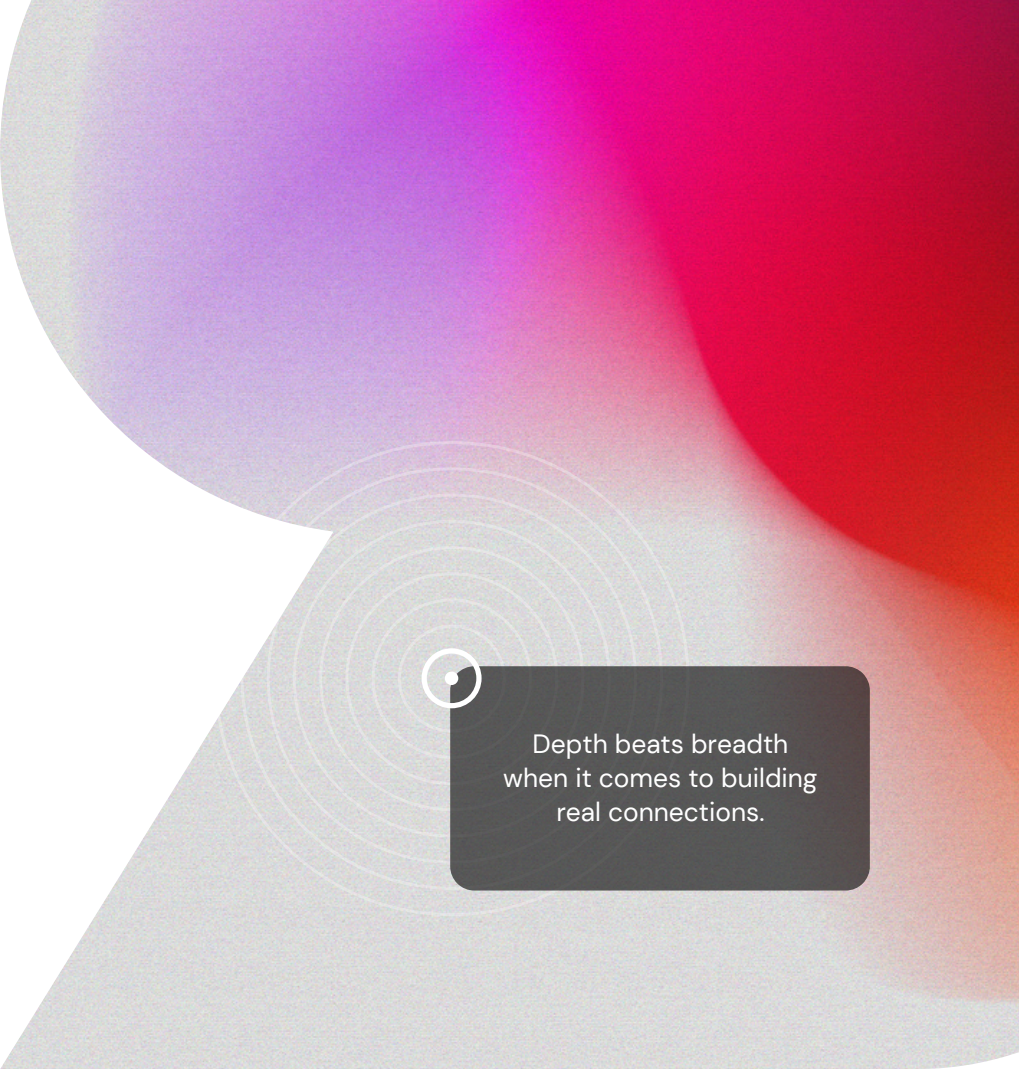
Services Listed With Clarity

Don't make people guess what you offer — spell it out, simply and clearly. Your website should highlight your services in a way that's:

- **Easy to scan**
- **Straight to the point**
- **Focused on benefits, not just features**

Social Media Platforms That Matter

It's not about being everywhere
— it's about showing up where it
counts.



Depth beats breadth
when it comes to building
real connections.

Focus on the platforms that **align with your audience** and your goals:

- **Facebook** – Community building, ads, and local engagement
- **LinkedIn** – Professional credibility and B2B connections
- **Instagram** – Visual storytelling and brand personality
- **YouTube** – Education, trust-building, and long-form content
- **Twitter/X** – Timely updates, thought leadership, and quick engagement



If it doesn't educate, inspire,
or engage — it's just noise.

Posting With Purpose:

More posts don't always mean more impact. Instead of flooding your feed, focus on quality content that educates, engages, or inspires your audience.



Value vs. Volume

Every post should have a reason to exist — whether it's answering a question, showcasing expertise, or driving action.

- Post consistently, not constantly
- Speak to real needs, not just trends
- Aim for conversations, not just clicks

Remember: It's better to be relevant than just visible.

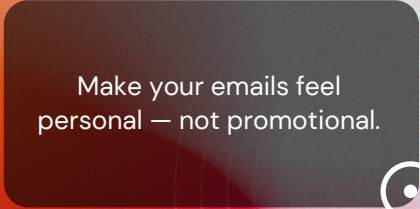


Consistent Branding Across Platforms

Every touchpoint is a chance to reinforce your brand. From your website to social media, emails to print — **your logo, colors, voice, and messaging** should feel like one seamless experience.



Making It Personal



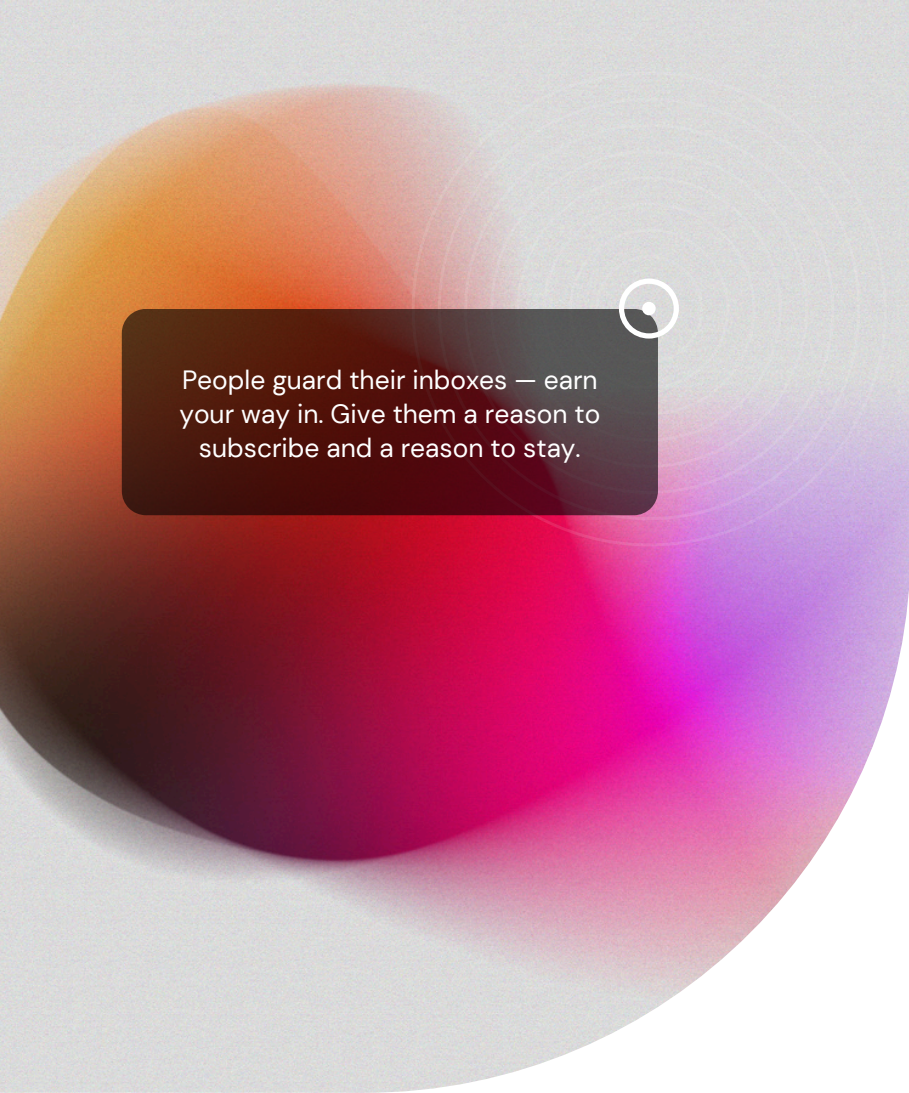
Make your emails feel
personal — not promotional.

Making It Personal

Custom Emails & Referral Generation

- Building your email list the right way
- Welcome series & nurture sequences
- Monthly newsletters: educate + engage
- Referral strategies that feel natural
- Testimonials and stories: word-of-mouth with reach





People guard their inboxes — earn your way in. Give them a reason to subscribe and a reason to stay.

Building your email list the right way

A strong email list is one of your most valuable marketing assets — but it's only as good as how it's built.

Focus on quality over quantity by:

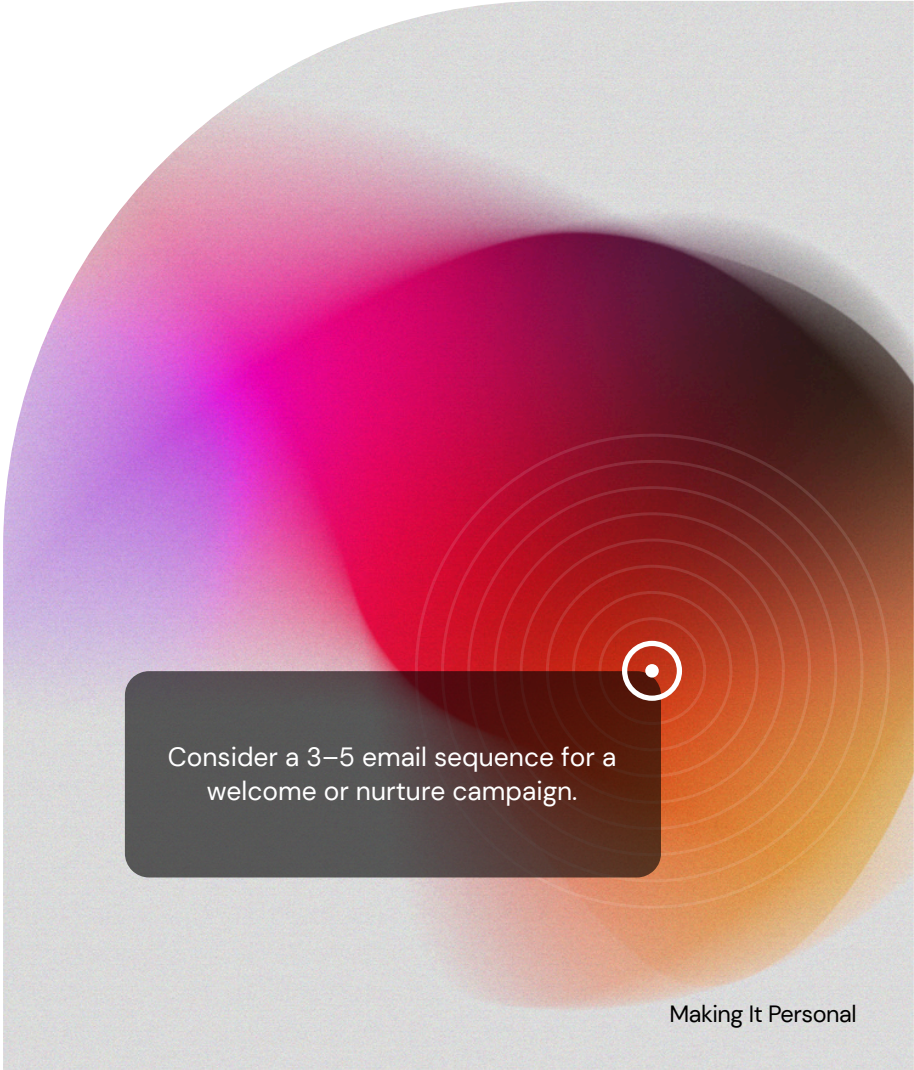
- Using clear opt-ins with real value (like guides, checklists, or tools)
- Collecting permission-based contacts through your website, events, and social media
- Segmenting by interest or need to personalize follow-ups
- Keeping it clean — regularly update and remove inactive subscribers

When you build it right, your list becomes a direct line to your warmest leads and most loyal clients.



Welcome Series & Nurture Sequences

Your welcome series sets the tone — **keep it warm, helpful, and human.** Use follow-up emails to deliver value, build trust, and guide them toward that first “yes.”



Consider a 3–5 email sequence for a welcome or nurture campaign.



Monthly Newsletters

Your monthly newsletter is more than a check-in — it's a chance to stay **top of mind** and deliver consistent value.

Educate + Engage

Use a monthly newsletter to:

- Share timely updates, reminders, and industry news
- Provide actionable tips that help solve real problems
- Highlight services, testimonials, or success stories
- Drive referrals, event sign-ups, or calls to action

When done right, newsletters feel like helpful advice
— not sales pitches.

Referral Strategies That Feel Natural

The best referrals don't have to be forced — they come from **genuine relationships and great service.**



Referrals grow when people feel confident in sharing your name.



Make referrals easy and organic by:

- **Asking at the right time** — like after a win or positive experience
- **Using soft language** like “Who else do you know that could benefit from this?”
- **Providing simple tools** — referral cards, email templates, or shareable links
- **Offering value in return** — whether it’s appreciation, a small gift, or added support



Testimonials: Word-of-Mouth with Reach

Nothing builds trust like a real story. Client testimonials and success stories **add credibility, emotion, and proof** that your service delivers.



Use testimonials to:

- Highlight real results from real people
- Share client experiences that reflect your brand values
- Reinforce key benefits in a relatable way
- Repurpose across your website, emails, and social media

Authentic stories build connection —
and that's what drives conversions.



Thinking Outside the Box



Thinking Outside the Box

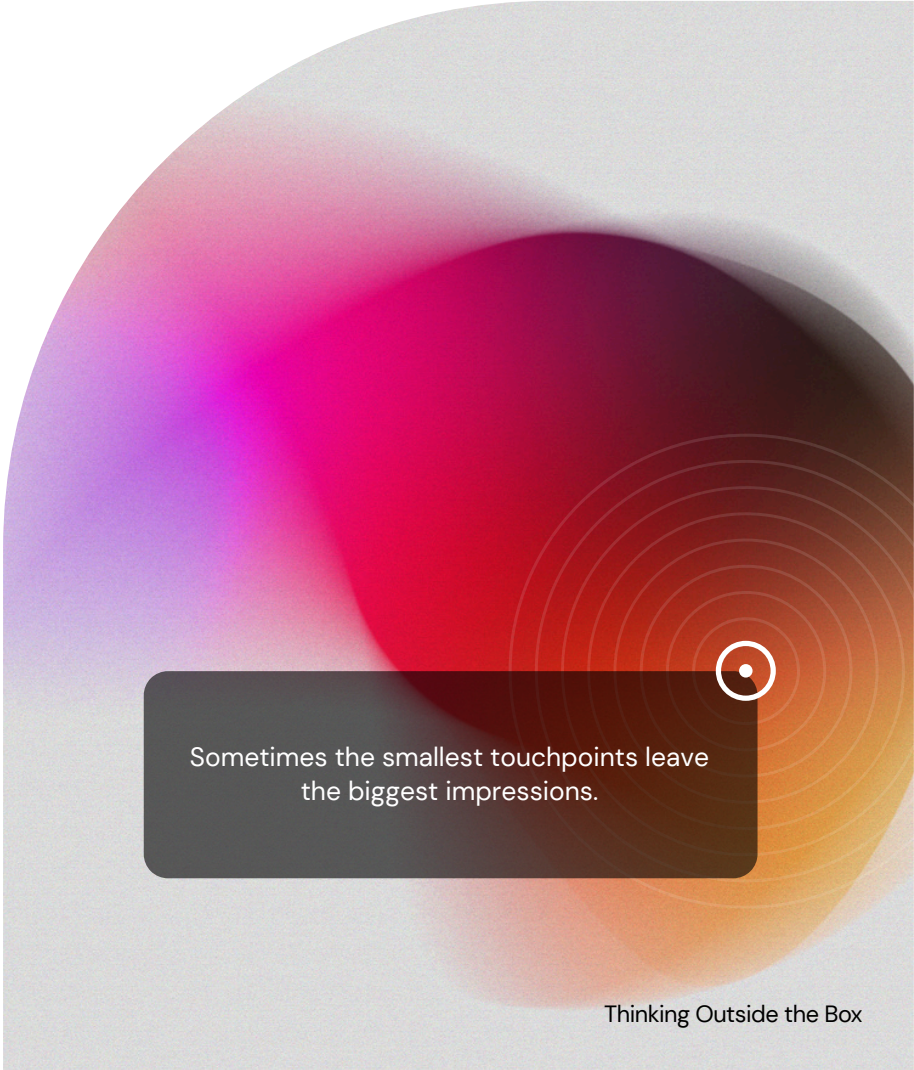
Unique Marketing Materials & Community Involvement

- Coasters, magnets, pens, and more
- Hosting or sponsoring local events
- Printed handouts that actually get read
- Positioning yourself as the go-to agent

Coasters, Magnets, Pens, and More

Branded items like coasters, magnets, pens, and notepads keep your name in front of clients every day — on their desks, fridges, and in their hands.

They're **practical, cost-effective**, and **long-lasting reminders** of your value.



Sometimes the smallest touchpoints leave the biggest impressions.

Hosting or Sponsoring Local Events

There's no substitute for real, face-to-face connection.

Local events — whether you're hosting a workshop or sponsoring a community gathering — **create visibility, credibility, and trust** within your market.



Don't just show up — show value. Offer helpful tips and free resources.





Benefits include:

- Meeting potential clients in a warm, low-pressure setting.
- **Positioning yourself** as a helpful, knowledgeable local resource.
- **Strengthening relationships** with referral partners and community leaders.
- **Increasing brand exposure** through signage, giveaways, and word-of-mouth.

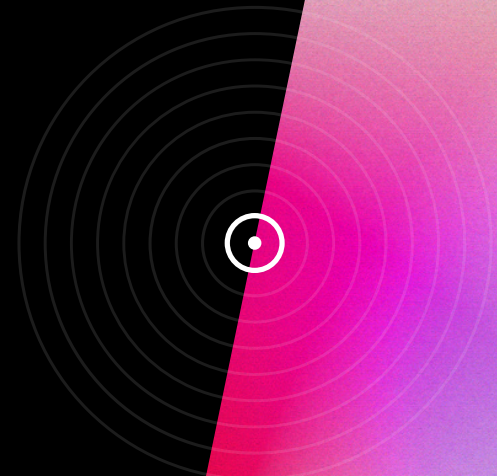
Printed Handouts That Actually Get Read

Not all print materials are created equal — the ones that work are **clear, useful, and worth keeping.**

Great handouts should:

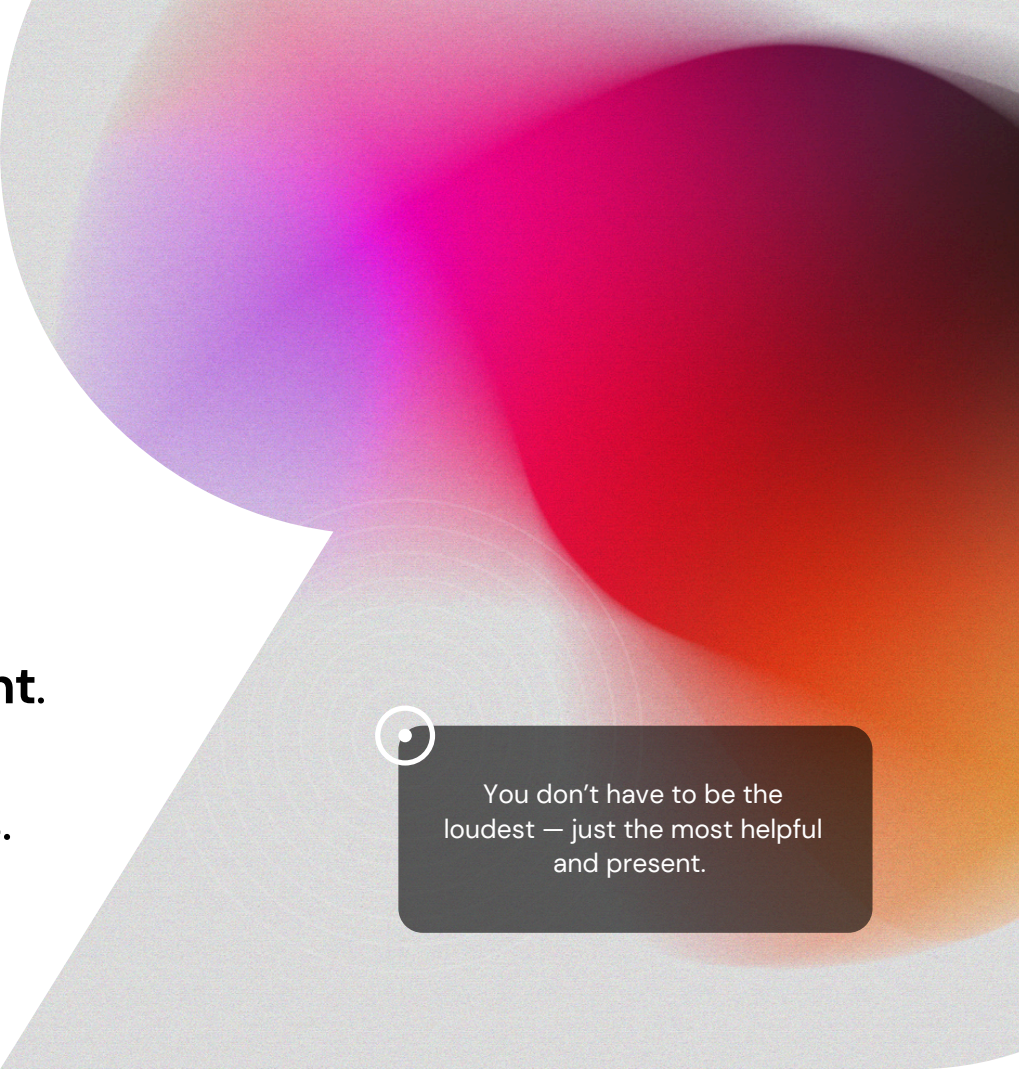
- Answer common questions quickly and clearly
- Highlight your services and contact info at a glance
- Provide real value — like checklists, tips, or guides clients can use
- Match your brand's look and tone for a polished impression

When designed with purpose, printed pieces become more than paper — they become tools that build trust and drive action.



Positioning Yourself as the Go-to Agent

In a crowded market, clients don't just want an agent — **they want their agent.** Being the go-to means you're the first call for questions, advice, and referrals. It's about trust, consistency, and visibility.



You don't have to be the loudest — just the most helpful and present.



Here's how to get there:

- **Show up regularly** — online and in your community
- **Educate with confidence** — share what you know, freely
- **Brand yourself clearly** — so people remember who you are and what you offer
- **Follow through** — always deliver on your promises



When you position yourself as a reliable resource, you become more than an option — **you become the obvious choice.**



Reputation is Everything

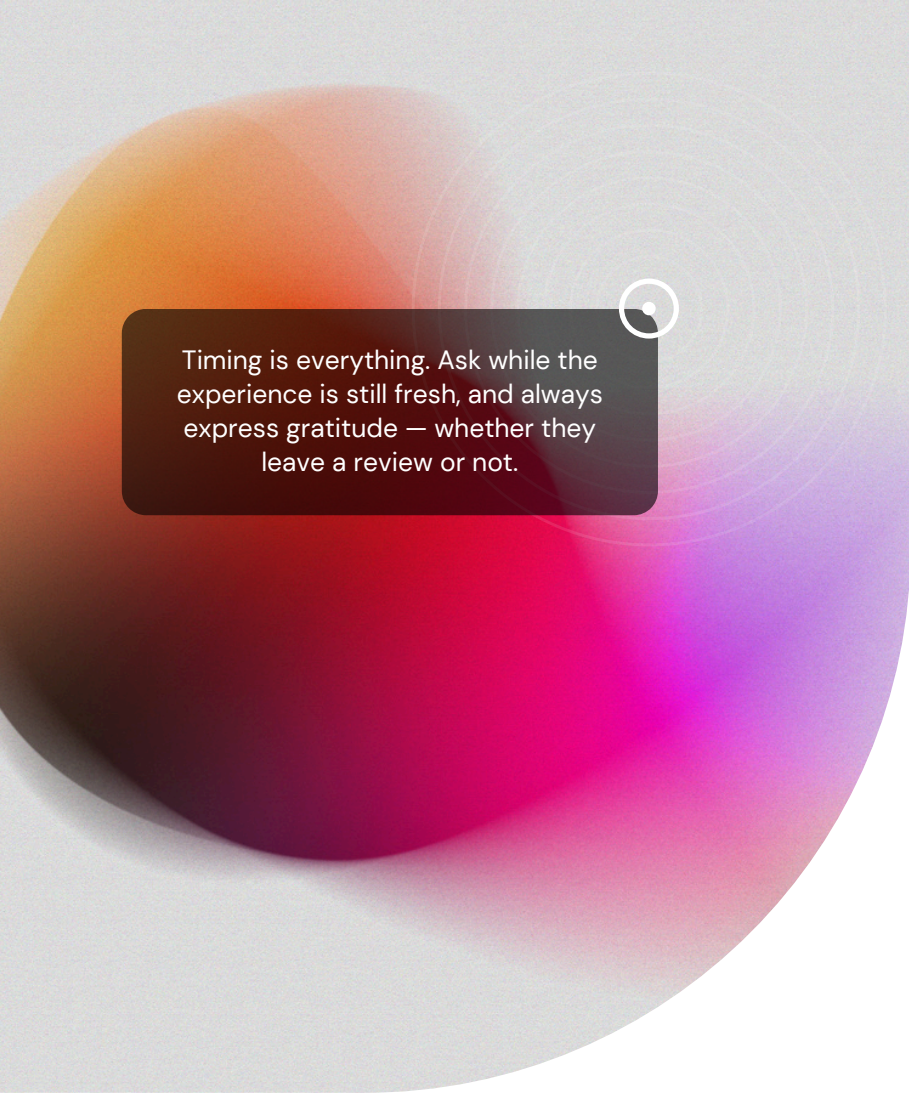
Don't leave reviews to chance. Ask happy clients to share their experience

Reputation is Everything

Online Reviews, Credibility & Brand Consistency

- Asking for reviews the right way
- Leveraging Yelp, Google, Facebook reviews
- Monitoring your online reputation
- How reviews boost search and trust





Timing is everything. Ask while the experience is still fresh, and always express gratitude — whether they leave a review or not.

Asking for Reviews the Right Way

The best time to ask for a review?
Right after a great experience. But how you ask makes all the difference.



Make asking for reviews easy and comfortable by:

- Keeping your request short, friendly, and personalized
- Providing a direct link to where you want the review
- Letting them know how much it helps your business
- Giving them a quick example of what others have shared



Leveraging Yelp, Google, Facebook Reviews

Your clients are already using these platforms — **make sure your reputation shows up where they're looking.**

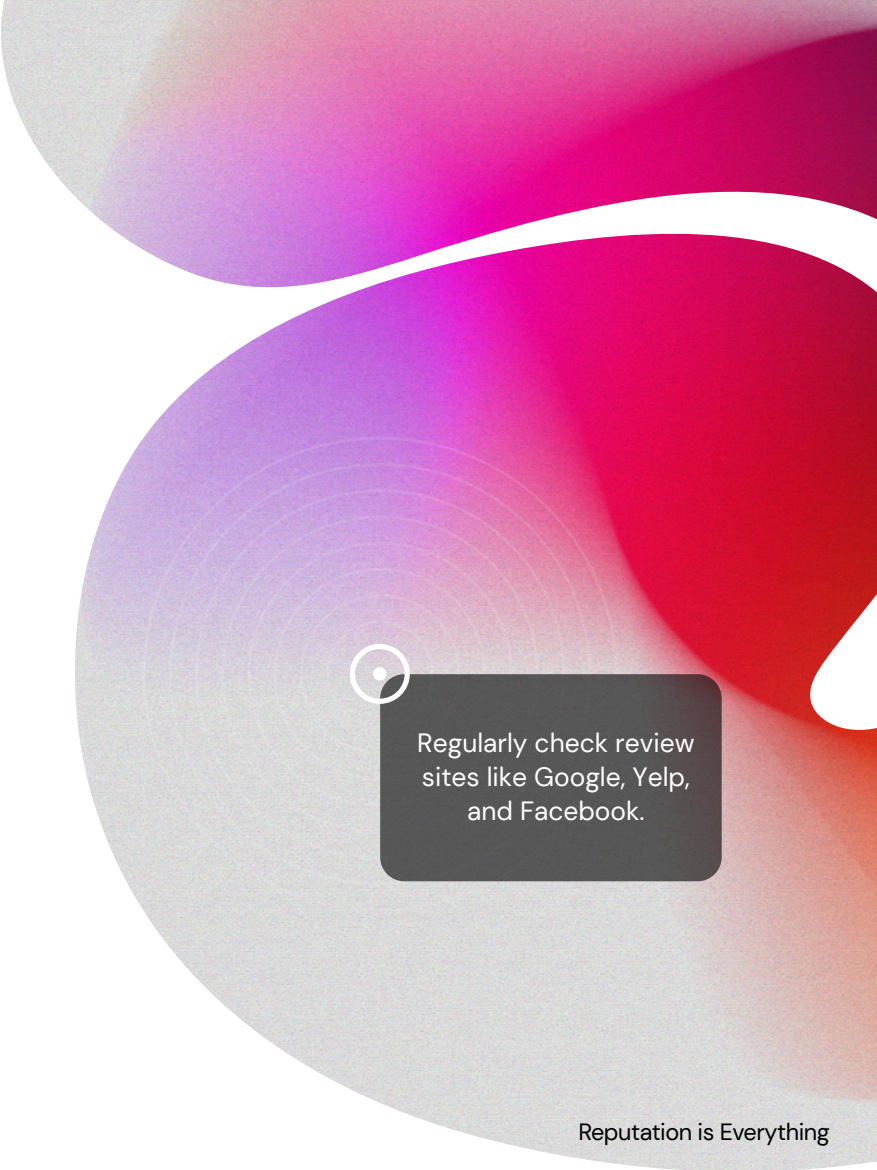
Yelp, Google, and Facebook reviews are powerful trust signals that:

- Boost local search rankings and online visibility
- Influence decision-making before a conversation even starts
- Give your business credibility through social proof
- Help you stand out from competitors in crowded search results

Don't just collect reviews — **leverage them**. Share them on your website, social media, and email campaigns to amplify their reach.


Monitoring Your Online Reputation

Monitoring your online reputation is essential in today's digital-first environment. Whether you're an individual agent or a growing agency, what people see about you online shapes trust and influences buying decisions.



Regularly check review sites like Google, Yelp, and Facebook.

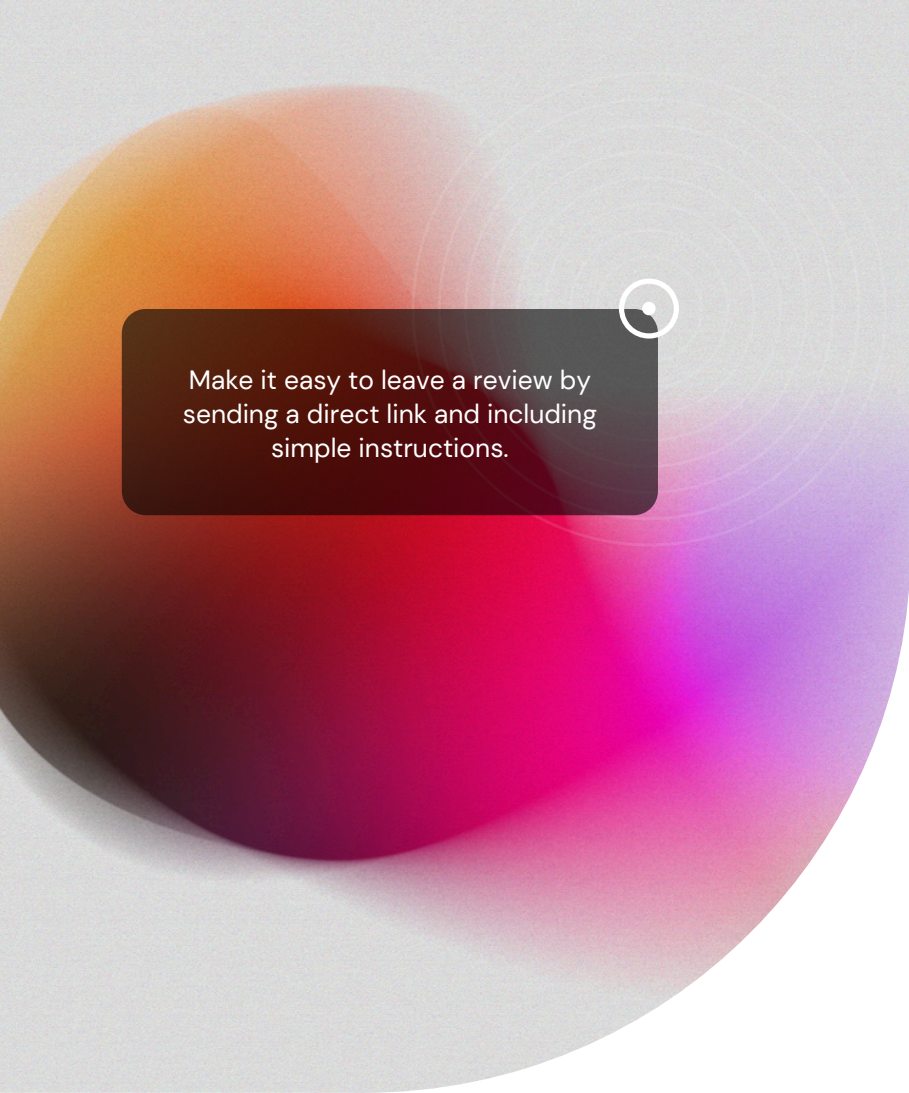




Staying on top of reviews, social media mentions, and search results allows you to:

- **Respond quickly to feedback**
- **Highlight positive experiences**
- **Address any issues before they impact your credibility.**

Proactive reputation monitoring isn't just damage control—it's a smart way to build trust and stand out in a competitive market.



Make it easy to leave a review by sending a direct link and including simple instructions.

How Reviews Boost Search and Trust

Online reviews do more than just influence opinions—they play a key role in helping prospects find you and feel confident choosing you.

- **Improve Local SEO**
- **Increase Visibility**
- **Build Credibility Fast**
- **Create Social Proof**
- **Boost Conversion Rates**



Key Takeaways

Building a strong brand and marketing strategy isn't just about looking professional—it's about standing out, building trust, and driving real business growth.

- **Clarify Your Brand**
- **Be Consistent**
- **Leverage the Right Tools**
- **Create Value-Driven Content**
- **Stay Active and Engaged**
- **Track What Matters**



Questions?

From Brand Basics to Marketing Momentum

A Guide to **Branding & Marketing** Your Insurance Business

Checklist



1.) Laying the Foundation

- Understand why first impressions matter
- Design a clean, modern, and memorable logo
- Choose a consistent color palette, typography, and brand tone
- Craft a clear mission statement and value proposition
- Build trust by maintaining brand consistency across all channels

2.) Creating Your Digital Home

- Treat your website like your storefront—make it clean and user-friendly
- Clearly list your services and value proposition
- Focus on social media platforms that matter to your audience
- Post with purpose—prioritize value over volume
- Keep branding consistent across all digital platforms

3.) Making It Personal

- Build your email list the right way
- Set up a welcome and nurture series
- Send monthly newsletters
- Share testimonials and stories

4.) Thinking Outside the Box

- Use branded items (coasters, pens, magnets)
- Host or sponsor local events
- Create engaging print handouts
- Position yourself as the go-to local agent

5.) Reputation is Everything

- Ask for reviews the right way
- Use platforms like Yelp, Google, and Facebook
- Monitor your online reputation regularly
- Leverage reviews to boost search and trust



Thank You

"By fostering strong partnerships, innovation, and a dedication to agent success, we strive to be more than just an FMO—we are a trusted partner in helping agents build a thriving, sustainable business."

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