

Creating Greater Opportunities for Long-Term Growth



LIC Marketing & Distribution Virtual Meeting

Via Webex | July 25, 2024 | 1-4 p.m. Eastern

This event provides an opportunity to discuss challenges and opportunities and share ideas with fellow marketing executives from small-to-midsize life companies and distribution partners. Join in the conversation to help marketers and distributors work better together, leveraging opportunities for long-term growth.

Who Should Attend: CMOs and senior sales leaders from small to midsize life insurers and fraternal organizations, as well as senior managers of agencies/IMOs that serve the small to midsize carrier market.

PRELIMINARY AGENDA

- 1:00 p.m. ET **Welcome & Introduction**
Dean Lambert, Executive Director, LIC
- 1:15 p.m. ET **Toward a Better Understanding**
What are the top challenges carriers find in working with distributors? What's on the wish list from the distributors' perspective? Envisioning the perfect relationship for mutual success.
- 2:00 pm ET **Facilitated Discussion Topics – Sales & Marketing Issues and Best Practices**
Topics will be pre-selected by participants. What's on your mind? This is a chance to find out what other companies are experiencing on topics such as lead sources, agent recruitment, digital customer/agent experience, cross marketing, and incentive trips.
- 2:30 p.m. ET **Brand Marketing & Sales Impact**
Tim Heaton, Managing Member, Heaton Consulting
Mark Rothwell, President, The Brand Matters
- Growing a company takes time and considerable resources. To improve the return on investments in revenue generation, it is important to understand how each component contributes to the overall goal and key steps to creating a fully integrated plan. Improvements in brand management, marketing, sales and distribution systems will deliver measurable results in attracting and retaining customers who can be advocates for your company.
- This session will examine the role of Brand Management, Marketing, Sales, and Distribution Systems in revenue generation. Panelists will discuss how customer assessments (customer preferences, segmentation, buyer personas, and prospect profiling) coordinated with corporate planning creates stronger internal alignment – enhancing performance and strengthening the brand promise with external stakeholders.
- 4:00 p.m. ET **Adjourn**

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