

A Network of Peers Sharing Practical Solutions



LIC Home Service & Marketing Committee Meetings Hosted by Liberty Bankers Insurance Group | Dallas | July 18-20, 2023

# AGENDA

The LIC Marketing and Home Service Committee Meetings provide an opportunity to develop business relationships and share ideas with fellow marketing executives from small-to-midsize life companies. Home Service and Marketing registration covers either or both events.

# Tuesday, July 18, 2023

- 2:00 pm CT LIC Home Service Committee Meeting (also open to Marketing attendees) Welcome from LIC and Liberty Bankers Insurance Group
- 2:15 pm CT Attendee Introductions & Activity Reports
- 3:00 pm CT Overview of the Home Service Marketplace Todd Stone, SVP Home Service Division, Liberty Bankers Insurance Group Todd Stone has led Liberty Bankers' Home Service Division since 2005 and has been in the home service life business since he began his career in 1989. He will provide his insights and lead discussion about current and emerging target markets, distribution challenges and opportunities...and why home service remains a viable, relevant, and exciting marketplace.



Todd Stone Liberty Bankers

- 4:00 pm CT Adjourn for the Day
- 6:30 pm CT Networking Dinner Hosted by LIC at The Ranch

## Wednesday, July 19, 2023

- 8:30 am CT Breakfast Hosted by Liberty Bankers
- 9:00 am CT Home Service Facilitated Discussion Topics requested by participants include:

Ideas on getting agents back in the field

- Ideas on getting agents back in the field collecting & selling
- Ideas on partnering with qualified funeral homes for leads and sales
- 11:30 am CT Networking Luncheon Hosted by Liberty Bankers
- 12:30 pm CT Home Service Committee Meeting Adjourns

- Recruiting
- Pricing
- What will our distribution model look like in 10 years?



# Wednesday, July 19, 2023, continued

#### 2:00 pm CT LIC Marketing Committee Meeting (also open to Home Service attendees) Welcome from Liberty Bankers and LIC Attendee Introductions & Activity Reports

2:30 pm CT How Well Do You Know Your Consumer? Carlos Rojas, Consumer Insights Innovator

> Carlos Rojas is a design and innovation enabler whose passion for understanding customers has helped organizations shape the conditions that make them more adaptive, creative, and prolific when solving modern business challenges. He will share insights such as purchase behaviors and applicability to marketing, sales, and customer experience.

#### 3:30 pm CT Marketing Facilitated Discussion

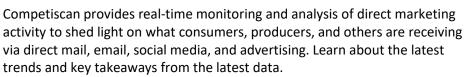
Topics requested by participants include:

- Compensation Effects of inflation on production and persistency/lapse
- Product Pricing
  Digital Customer Experience, Agent Experience
- Lead Sources
  Cross Marketing
- Agent Recruitment
  Incentive Trips
- 4:30 pm CT Adjourn for the Day
- 6:30 pm CT Networking Dinner Hosted by LIC at Mexican Sugar

## Thursday, July 20, 2023

- 8:30 am CT Breakfast Hosted by Liberty Bankers
- 9:00 am CT Trends in Lead Generation

Michael Ruffing, Senior Sales Director, Competiscan



## 9:45 am CT Consumer-Member Engagement/Earned Media

Dean Lambert, Executive Director, LIC

Prior to becoming LIC's Executive Director this year, Dean Lambert spent 25 years in Marketing and Communications at Homesteaders. Dean will discuss "owned" vs "paid" vs "earned" media; planning, managing, and measuring effectiveness; creating interesting and engaging content; and ultimately driving customer experience – the key to a strong brand.

- 10:30 am CT Marketing Facilitated Discussion (continued) Any remaining requested topics, and any new discussion based on this week's sessions, will be covered in this closing session.
- 11:30 am CT Networking Luncheon Hosted by Liberty Bankers
- 12:30 pm CT Marketing Committee Meeting Adjourns



Michael Ruffing Competiscan



Dean Lambert LIC



Carlos Rojas Consumer Insights Innovator