

# 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.*

1:00 p.m. ET **Welcome & Introduction: Dean Lambert, Executive Director, LIC**

1:15 p.m. ET **Case Study: Distribution Challenges and Opportunities - Assumption Life & LAVVI**

Pierre Martin, AVP, Partnerships & Digital Distribution, Assumption Life

Ray Adamson, Chief Customer Officer, LAVVI

Learn about Assumption Life's journey in growing policy sales and revenue with help from LAVVI's digital distribution platform. Illustration of the current state of distribution, with perspective on omni-channel and the emergence of online distribution.

2:00 pm ET **Toward a Better Understanding – Facilitated Discussion on Marketing & Distribution Issues**

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. What are the top challenges carriers find in working with distributors? What's on the wish list from the distributors' perspective? Let's envision the perfect relationship for mutual success.

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. Presenters 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. The session will close with three executives reviewing strategic decisions and actions taken when they pursued direct to consumer market in addition to using independent agencies for distribution (featuring Mark Rothwell plus Steve Shaffer, CEO of Homesteaders, and Dierdre Woodruff, Senior Vice President of Puritan Life).

4:00 p.m. ET **Adjourn**

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