

# A Network of Peers Sharing Practical Solutions



## LIC Marketing & Home Service Committee Meeting

Hosted by RGI Data Assets | Online Via Webex | Wednesday, July 29, 2020, 10am-3pm EDT

Register at [www.loma.org/LICMKT](http://www.loma.org/LICMKT)

Access instructions will be included in the registration confirmation email.

### PRELIMINARY AGENDA

- 9:30 a.m. EDT **Greetings and A/V Checks**  
We'll be online 30 minutes early so you can check audio and video and catch up with your colleagues. See [www.loma.org/webex](http://www.loma.org/webex) for LIC's guidelines and tips.
- 10:00 a.m. **Welcome & Attendee Introductions**  
*Jeff Shaw, CLU, ChFC, Executive Director, LIC*  
Each attendee will have an opportunity to introduce themselves and their company, including current initiatives, biggest challenges, and goals for the meeting.
- 10:45 a.m. **Increase Your Business with Data-Driven Lead Generation**  
*Alexis Cierra Holt, Director of Sales, RGI Data Assets*  
*Tim Mauzy, Vice President, Senior Select Insurance Group an Integrity Company*  
*Bob Donnellan, Vice President of Sales and Marketing, RGI Data Assets*  
In an engaging, Q&A, interview-style format, RGI and Senior Select will share stories, successes, and insights from their longtime partnership, including their 2020 Agent Recruitment campaign that has generated over 250 agent prospects. RGI will also discuss their data-driven approach to direct-mail lead generation.
- 11:30 a.m. **Email Communication and LinkedIn Best Practices Case Study**  
*Betsy Hubbard, Founder & President, Mindset Digital*  
*Mark Brandt, CLU, ChFC, RHU, CASL, AVP, Market Research and Development, Baltimore Life*  
An interactive case study/discussion on how consumer expectations and conversation patterns have changed, the impact that developing an "SOS" habit has had on Baltimore Life's communication strategies, and best practices and tips to tap into the power of LinkedIn for your agents. Change is hard – let's discuss what changes might be needed in your marketing outreach, and how to increase the odds that these changes will be successful.
- 12:15 p.m. **Break**
- 1:15 p.m. **Product Implications When Repriced under Current Economic Realities**  
*Marianne Purushotham, Corporate Vice President, LIMRA*
- 2:00 p.m. **Facilitated Discussion with Live Polling**  
*Jeff Shaw, CLU, ChFC, Executive Director, LIC*  
Find out what others are doing, what's working and what isn't, and discuss common challenges and solutions. Topics include the following - send additional suggestions by July 17 to [jshaw@limra.com](mailto:jshaw@limra.com).
- COVID-19: Impact on processes – what changes are permanent and what will return to normal; claims experience; preparation for the possibility of a second wave
  - Recruiting
  - Lead Generation
  - Management of Home Office Sales and Marketing Staff
  - Racial Injustice: How has your company responded?
- 3:00 p.m. **Adjourn**

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### PRELIMINARY ATTENDEE LIST

*(as of July 13)*

American Benefit Life Insurance Company - Chris Meredith, Senior Vice President, Pre-Need  
American Savings Life Insurance Company - Michael Frahm, MBA, CFP, CLU, FLMI, LUTCF, CLF, Vice President  
Atlantic Coast Life Insurance Company - Tom Holland, CPC, Vice President National Accounts  
Baltimore Life - Mark Brandt, CLU, ChFC, RHU, CASL, AVP, Market Research and Development  
Catholic Life Insurance - Mike Belz, FIC, LLIF, President and Chief Executive Officer  
Columbian Mutual Life - Rick Relf, FLMI, ALHC, ACS, SVP, CMO  
LIC - Audrey Wittenburg, ALMI, ACS, Associate Director  
LIC - Jeff Shaw, CLU, ChFC, Executive Director  
Management Research Services, Inc. - Tim Dineen, Chief Executive Officer  
Mindset Digital - Betsy Hubbard, Founder & President  
National Slovak Society/NSS Life - Greg Felton, CLU, ChFC, FLMI, National Sales Director  
Old American Insurance Company - Dave Metzler, FSA, MAAA, CLU, ChFC, FLMI, ACS, Chief Actuary  
RGI Data Assets - Alexis Holt, Sales Director  
RGI Data Assets - Bob Donnellan, Vice President Sales and Marketing  
RGI Data Assets - Cassie Maher, Marketing Programs Director  
Security National Life Insurance - Jason Overbaugh, Vice President  
Senior Select - Tim Mauzy, Vice President  
Texas Service Life Insurance Company - Vince Arena, Chief Marketing Officer  
Texas Service Life Insurance Company - George Wise, FSA, Chief Actuary  
United Home Life - Steve Ramsey, CLU, ChFC, Director, Independent Distribution Channel Marketing  
Western Catholic Union - Matthew Bainbridge, FLMI, ARA, AIRC, Director-Home Office Operations