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## 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 collecting & selling
- Ideas on partnering with qualified funeral homes for leads and sales
- Recruiting
- Pricing
- What will our distribution model look like in 10 years?

11:30 am CT **Networking Luncheon**  
**Hosted by Liberty Bankers**

12:30 pm CT **Home Service Committee Meeting Adjourns**

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## 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.



*Carlos Rojas*  
*Consumer Insights Innovator*

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

Topics requested by participants include:

- Compensation
- Product Pricing
- Lead Sources
- Agent Recruitment
- Effects of inflation on production and persistency/lapse
- Digital Customer Experience, Agent Experience
- Cross Marketing
- 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

Competiscan provides real-time monitoring and analysis of direct marketing activity to shed light on what consumers, producers, and others are receiving via direct mail, email, social media, and advertising. Learn about the latest trends and key takeaways from the latest data.



*Michael Ruffing*  
*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.



*Dean Lambert*  
*LIC*

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**