

Insurance Agency Positioning Template

Use this template to create and refine your agency positioning. Make sure the information is specific. You should be able to hand this document to anyone outside of your organization and they should be able to easily “get it”

1. The Alternatives

Imagine your agency never existed. What would customers use as an alternative to you?

- 1.
- 2.
- 3.
- 4.
- 5.

2. What Makes You Truly Special?

Features, capabilities, relationships, expertise that only you have in your market:

- 1.
- 2.
- 3.
- 4.
- 5.

3. The Benefits

What value do your attributes above deliver for customer and why should they believe you?

- 1.
- 2.
- 3.
- 4.
- 5.

4. Customer That Care

Who cares a lot about the value listed above? Specific groups of customers that care about your value & how you recognize them:

- 1.
- 2.
- 3.

Boilerplate Messaging

The One-Liner

This is a one or two sentence description of what you do. It should focus on what you are and the greatest benefit you deliver. Bonus points for giving a hint about who you are for.

The One-Paragraph Elevator Pitch

A one paragraph description of what you are, the top one or two value points you deliver and some indication of what your target market is. Bonus points for indicating some proof you can deliver the value you say you can.

The 100 Word Description

This is usually one to two paragraphs. Here you have room to include what you are, your top 2 to 3 value points, an indication of proof you can deliver that value, and something that indicates what your target market is.

The 500 Word Description

This is usually one to 4 to 5 paragraphs. Here you have room to include what you are, a longer description of your top 3 to 4 value points, proof you can deliver that value, and something that indicates what your target market is. In this longer form you can also include additional general proof of market position and/or traction which would include names of customers, brag-worthy statistics (number of users, usage metrics, etc but only if they are clearly exceptional and understandable), awards won, etc.

The Goal:

Go back and read your positioning statements and ask yourself “does this sound like anyone else in my market?” If it does, then you aren’t doing a good enough job positioning your agency as anything different.

It’s OK if your positioning sounds like another agency in a different geographical market as long as your two agencies do not compete for the same customer.

Your positioning statement should be attractive to your ideal customer. If your agency adopts technology, then your positioning should attract tech adopters. Think of your positioning as the aroma that attracts your perfect clients.

Use this document to craft your marketing, your service processes, and even your hiring.