



MARKET
ACCESS DIRECT

KEEPING YOU **CONNECTED TO**
PROSPECTS AND CLIENTS

WELCOME

WE ARE PROUD
TO PROVIDE
VITAL INDUSTRY
ASSISTANCE EVERY
SINGLE DAY.

Market Access Direct is a dedicated marketing service firm staffed by experienced marketing professionals with decades of experience in the insurance industry and senior market. In other words, we understand this environment and know how to help boost performance through effective marketing communications to a targeted audience.

We currently provide our services to multiple career and independent agencies and support thousands of agents with our lead and marketing systems.

**MARKET
ACCESS
DIRECT**

COMPANY OVERVIEW

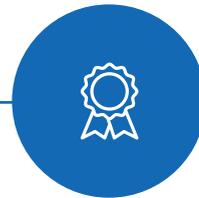
Market Access Direct, LLC was founded in 2012 to provide a turn-key marketing system to Insurance Agents that are Career, Independent or with an Independent Marketing Organization. Our system is the result of over 30 years of insurance marketing experience with direct, career and independent sales channels. We focus on the development of prospecting tools and systems that agents use because they are easy to learn and positively impact their sales.

Our turnkey marketing system helps agents stay connected to prospects and clients. We do this by helping agents **build** relationships with prospects and **maintain** relationships with clients. Our system provides marketing and contact management support via lead generation, emarketing and cross-sell programs.



KEY TO OUR SUCCESS

The key to our success is that we keep the system simple and focused on programs that help agents increase their relationships and therefore increase their sales.



OUR APPROACH

The approach for our turnkey system is to customize the combination of and functionality of our offerings to fit the specific go-to-market needs of your organization.

OUR AREAS OF EXPERTISE INCLUDE

- **Agent Marketing System** – Contact Management with Proactive Marketing.
- **Direct Mail Lead Generation Marketing Programs** – Specific to Medicare, Long Term Care and Final Expense.
- **Online Marketing** – Web Development and Social Media.
- **Marketing Material** - Development and Print Fulfillment – Newsletters, Greeting Cards, Customer Letter Programs.
- **Consulting** – Direct Response Expertise, Prospecting System Processes and Lead Generation Creative.

AGENT MARKETING SYSTEM

FOR THE AGENT

A system that takes the administrative work out of prospecting and marketing so agents can spend more time with prospects and clients. Highly effective marketing campaigns are automated, customized, and specifically timed to cultivate these relationships.



AMS

A key tool in managing your business, our Agent Marketing System (AMS) is the central hub for all clients and prospects. You can search, filter or sort easily based on data and custom tags. There is even a correspondence log for each contact. AMS includes a vast assortment of advanced features such as emailing, time since last contact, contact temperature, and follow-up scheduling. To make prospecting even easier, the system will automatically remind you of follow up events and client birthdays.



EMAIL MARKETING

The built-in library and drip campaign tools make it easy to send multiple emails at once while tracking key metrics. Every email is highly customized and professionally designed to create engagement.



GREETING CARDS

A quick and easy way to let your clients know you are thinking of them. In just a few clicks, create cards for holidays, birthdays, or to simply say thank you. Free up time for face to face sales calls by ordering a high-quality card from your desk or phone – no trip to the store or the post office.



PERSONAL SITE

Every agent using the system is provided a webpage. It is focused on building credibility enabling an agent to provide information to their prospects and clients immediately and inexpensively – making him or her available 24/7. Visitors to a page can request more information or access informational material to help with the insurance education process.



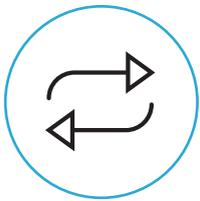
REPORTS

Reports on status and sales cycle are available to you on demand. Keep track of dials, contacts and appointments with an “at a glance” status report. With a few clicks per contact, get the information you need to identify strengths and weaknesses in your prospect processes.

AGENT MARKETING SYSTEM

FOR THE MANAGER

The manager level tools provide easy to use and efficient tracking for distribution of prospects, leads and clients. Time saving features include the ability to recall names from one agent to distribute to another in 4 to 5 clicks. The manager dashboard also tracks how many leads were provided to each agent. For the hands-on manager, activity tracking is built into each contact and real time reports are available 24/7.



PROJECT MANAGEMENT AND RECYCLE

Managers can transfer prospects and leads to and from agents. This is not just the first time a lead or prospect is added into the system but anytime. There is an automated process that will highlight names you may want to recall or move to a different agent as the lead or prospect ages, without turning into a client. Administrative accounts can be used if you want the names managed by someone else.



REPORTING

While everyone who uses AMS can get reports on status and sales cycle, a manager can get these reports for their entire downline, by manager or individual agent. There is a dashboard for quick review on leads received, agent activity, number of contacts and summaries on emails sent. This dashboard lets you know in seconds if your agents are on track.



DIRECT MAIL LEAD GENERATION



OUR APPROACH

Our mail program has been designed to separate you from the rest of the offers in the mailbox and separate your agent from the rest of the agents in the area. We don't stop at just getting you a high-quality lead, we continue to stay in touch with the respondent to keep their interest alive until they are contacted by an agent. The highly-personalized mailers are full color and bright – so people remember the mailer AND sending in the lead card. The offer is always for educational information.

YOUR TARGET MARKET

The majority of our lead programs focus on the senior market, defined as prospects age 50+. This market grows larger every day with prospects that truly need your help in finding insurance solutions to meet their needs and budget. We pinpoint prospects using segmentation tools and statistical models to get a balance between the quantity of leads and the lead's ability to solve for their insurance needs. In other words, our goal is to have an agent in a home that has the ability to buy a product that fits their need.

CREATIVE AND RESPONSES

Our lead portfolio includes reliable lead generation mailers for final expense life insurance, Medicare supplement, long term care, and birthday programs. To make sure we can help all agents, especially those on a limited budget, we offer a variety of lead and relationship building programs. All mailers are submitted to your compliance department for approval. It is our pleasure to make any changes deemed necessary.

LEAD CAPTURE AND DISTRIBUTION

Best of both worlds, you receive a scan of the actual lead card so you see handwriting and notes but the lead is delivered electronically so there is no chance of losing it. Leads are captured and distributed using our Agent Marketing System. Along with the lead we append additional demographic information. This information can often provide additional insight into the responder's situation. The free booklet offered in the mailing is provided to the lead by the contacting agent. Physical copies of the booklets are sent to the agent's location so they are readily available and also available online.

AGENCY AND CONSULTING SERVICES

ONLINE MARKETING

You need to be available to prospective clients wherever they may be looking for help. Whether it's an actual ad, email, post or online newsletter, your marketing materials should quickly connect with the prospect and drive action. We know how to generate a positive reaction. It comes from years of experience in the senior market. We're dedicated to providing copy and content that's accurate, easy to understand, and offers information that's important to the reader — content that prospects will be happy to read and anxious to respond to.

WEBSITE DESIGN

Your website is your first impression, make sure it is a good one and that it represents you – who you are and how you can help the reader. It is easy to skip from one site to another in search of the perfect agent. We know this and make sure your home page is engaging and draws the reader in so they spend more time on your site, getting to know you.

DIRECT RESPONSE CONSULTING

Our experience spans three decades of direct response marketing practices in the senior market. We've expanded our direct mail expertise to include website and online lead generation programs. This allows us to view your prospecting approaches and techniques more holistically to identify any additional opportunities. We invest the time needed to truly understand your business and make only those recommendations that have a quantifiable outcome.

*Strengthen ties with your clients and
get in front of more prospects.*



“LET US TAKE THE ADMINISTRATIVE WORK OUT OF PROSPECTING SO YOU HAVE MORE TIME TO BE FACE TO FACE WITH YOUR CLIENTS.”

- Margaret Audet

CONTACT US

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