



HAMMERING HOME YOUR MARKETING STRATEGY

BUILDING LEADS WITH RITA BERGSTEIN



Founder Profile

RITA BERGSTEIN

- **1994:** Harvest Insurance | Earned PA State Trip
- **1995:** Work in Health Insurance. Highmark, Health America Health Assurance. Earned Presidents Club.
- **2005:** Started w Aflac
- **2006:** Top Sales In Western PA
- **2007 - 2020:** Various Postitons | Top District Manager in Western PA and Nationally.
- **2023 - Present:** Neishloss and Fleming | 350 ACA Clients | 378 Medicare Clients

The Attraction Effect: Building a Business People Nauturally Gravitare Toward.

Let Them Chase leads While You Attrract Clients.

100% All Referrals. Not One Purchased Lead.

 Here's how I did it.

And here's ***how you can do it.***



GET THEM *BRAND YOURSELF*



RITA BERGSTEIN BENEFITS

We get you. We got you.

✉ Rita@ritabergstein.com ☎ 412-860-0519





Marketing Strategy

BRANDING

WHAT IS BRANDING?

- Your reputation
- The experience
- Your personality
- Your promise
- Your consistency
- Do I trust you?
- Built through thousands of small moments



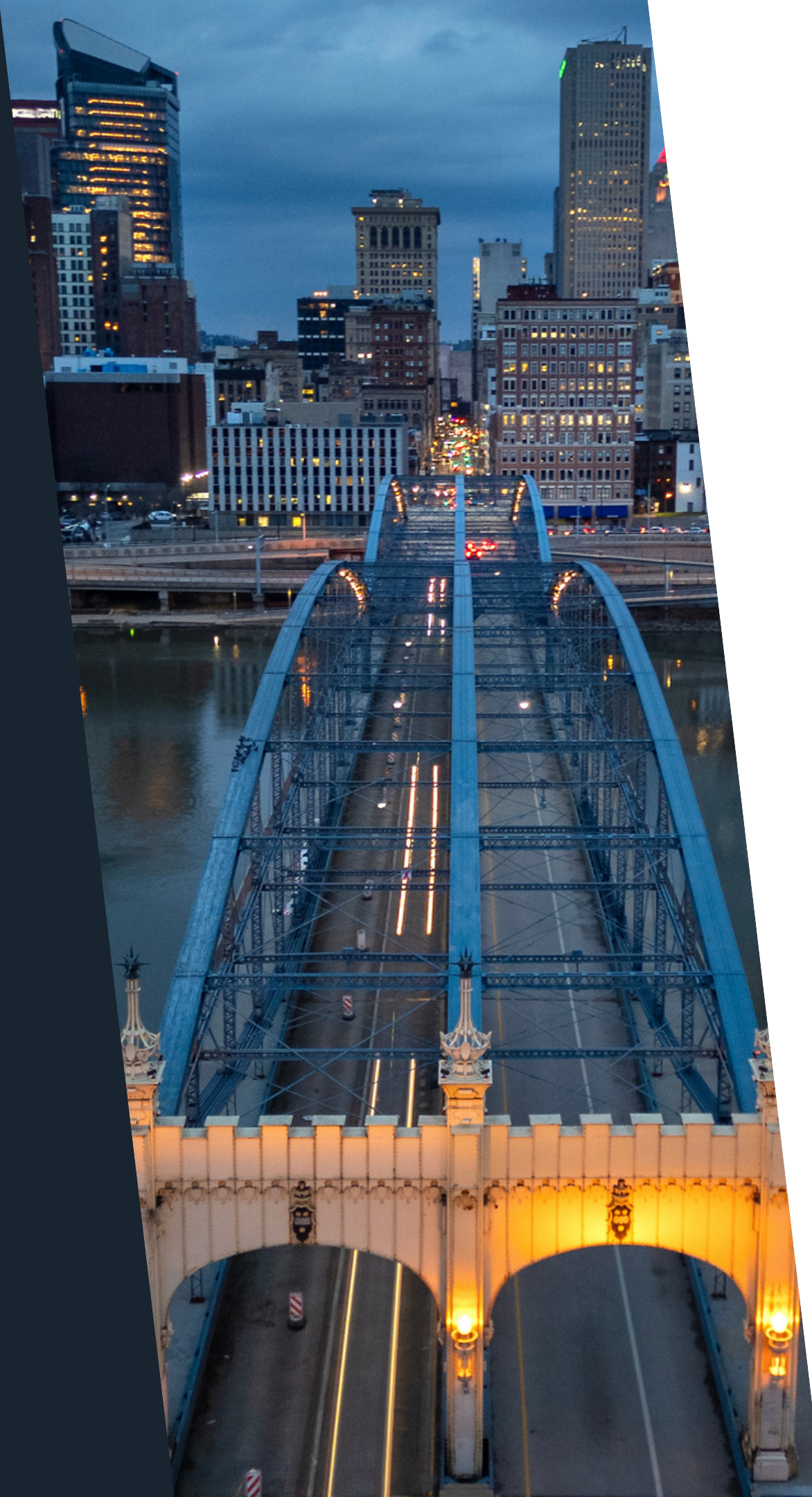
*Your Logo gets you noticed,
Your Branding gets you recognized.*

Marketing Strategy

SOCIAL MEDIA

- **Facebook | TikTok | Instagram**
- I post when I am on.
- Usually at 8-9 am, After dinner 6-7 pm, At 8-9 pm
- Don't use Old People Vector Photos. Get some of your friends.
- Use nostalgia from the 70's
- Don't always take or ask. Give information or advice for free.
- Use your branding on every post.
- Post Links so they can do research themselves.
- Anyone that has over 30 contacts in common with you, friend them.





Marketing Strategy

REACH OUTS

- EZ Texting
- Integrity Emailing
- Thank you cards
- Personal Thank you text for referrals
- Create a Team Culture with your Clients

Marketing Strategy

CREATE NATURAL MARKETS

- Sell ACA...leads
- Give your Info to Dental Offices, Financial Planners, Estate Planners.
- When you shop at small businesses, tell what you do. They may have employees turning 65.
- Talk about your work with friends, family. Resist asking for their business. Ask about my mother.
- Donate time to your community.
- Unions.
- Put up info at Private Clubs like VFW's and Legions. Why? Veterans.
- Offer to do an Educational Meeting.
- Set up at a Library Quarterly and of Course AEP.





KEEP THEM



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Marketing Strategy

BUILD RELATIONSHIPS

- Never use the word “Referral”.
- Give more than you ask for.
- Speak confidently and lead.
- Use assuring phrasing, regular talk, no fancy insurance speak.
- Find a common ground and connect.
- Offer help without them asking, ie, RX.
- Thank You cards, Birthday Emails, Updates, Reminders.
- Write notes from your last conversation and bring it up.
- Treat like an old friend, not a client.
- There’s a box?



MULTIPLY THEM



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Marketing Strategy

GREAT SERVICE MULTIPLIES

- What you do to keep them will multiply them
- If they send a few referrals, I'll send a \$5 panera Card.
"Have a cup of coffee on me."
- Ask about my Mother again.
- Ask people to post about you and your great service.
Better than testimonials
- If you are going to someones house to talk, let them
know its okay to invite others.
- Be genuine in everything.



Marketing Strategy

BUILD WITH US

- Build a business, not just a book of business.
- Attract instead of chasing leads.
- Learn strategies that work.
- Coaching and mentorship.
- Remain Independant.
- Grow at your own pace with a team that wants you to succeed.
- Collaborate with agents who share ideas, not compete.

Want to Chat?

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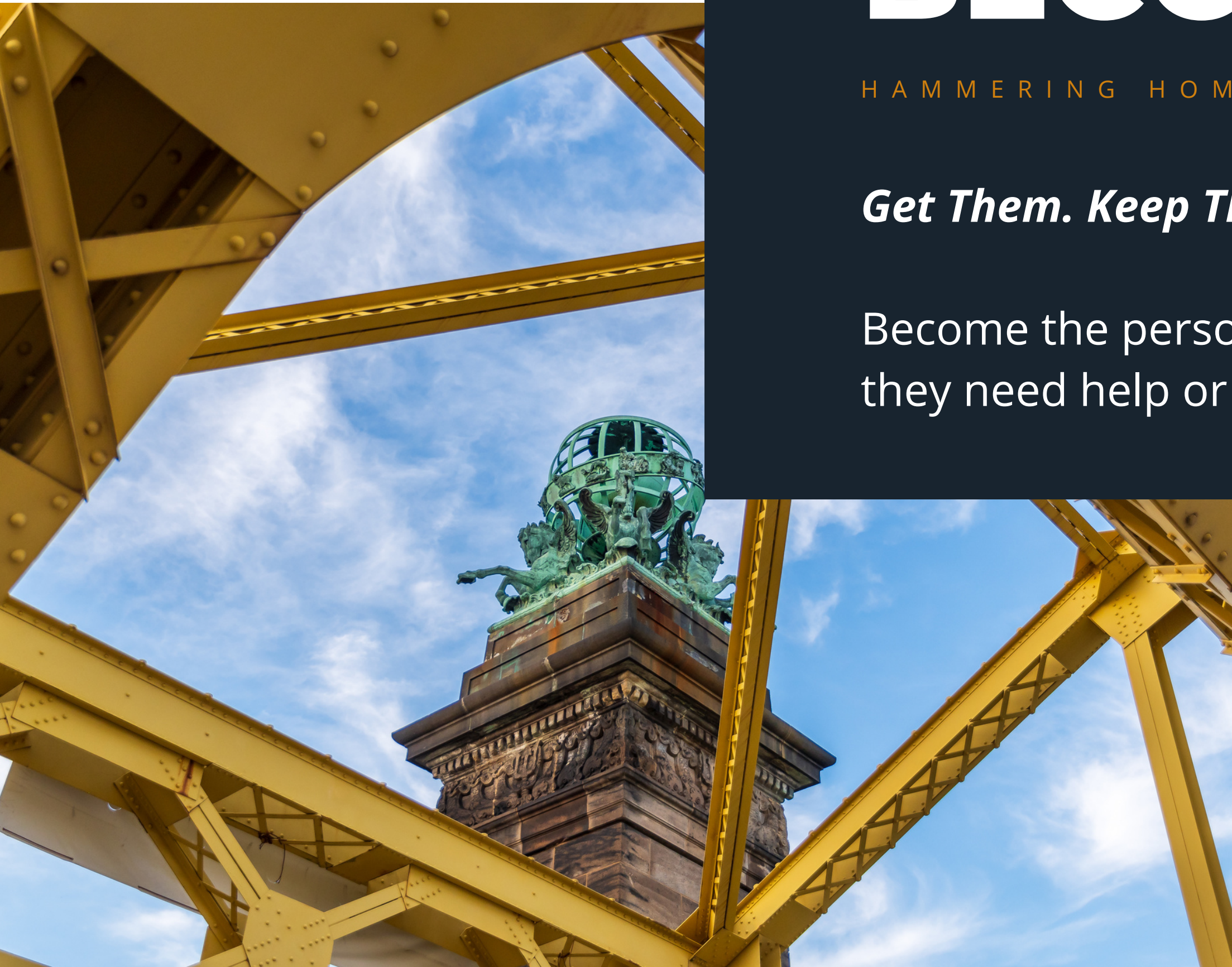


BECOME THEM

HAMMERING HOME YOUR MARKETING STRATEGY

Get Them. Keep Them. Multiply Them. Become Them.

Become the person people naturally think of when they need help or know someone who does.



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