



PIMA Institute II

Optional Post-MarketTech Workshop

November 17, 2009

Loews Philadelphia Hotel

12:30 p.m. - 4:00 p.m.



12:30 p.m. - 12:45 p.m.

Association & Insurance Trends

Allen Haney, JZA Affinity & ASAE Fellow

12:45 p.m. - 2:15 p.m.

Developing a Marketing Plan—a Proven Approach

Bill Tyson, Executive Vice President of AMPAC Insurance Marketing, Inc.

- Situational analysis - SWOT, competitive analysis, internal business review and market research
- Developing Growth Strategies
- Marketing Plan Strategies: The 7 Profitability Drivers
 - Targeting the audience/share of mind
 - Offer
 - Contact/touch points/communications
 - Media, including new media/social networking
 - Messaging
 - Creative
- Implementation and operational considerations
- Setting realistic Financial Goals/Performance Metrics

2:15 p.m. - 2:45 p.m.

Everything you wanted to know about Actuaries, but were afraid to ask!

Ragu Rangachar, Vice President, New York Life

2:45 p.m. - 3:00 p.m.

Break

3:00 p.m. - 3:40 p.m.

Case Studies: Learn from your peers!

- *Best Prospects: Treatment & Optimization*
Catherine Marakis, Management Supervisor, Bodden Partners
- *Customer Loyalty & Persistency*
Scott Kelley, Sr. Vice President, Aon Affinity Insurance Services

3:45 p.m.

Final Questions & Wrap-Up

Register using the MarketTech
registration form at
www.pima-assn.org