

Thank you for submitting our form!

Here are the details you sent us:

First name: Jerrie

Last name: Allen

Organization Name: Name To Be Announced

Address: 10031 Pines Blvd, #232

Enter your email address: usba45@netzero.com

Phone Number: [17863261364](tel:17863261364)

Assistant's Name: Ramona

Assistant's Email: rnickson.23@gmail.com

Assistant's Phone: [7862876211](tel:7862876211)

How would you paint success for your company in the next 6 -12 months?: 1) 5K Clients in 12 months 2) Representative working with us 3) Marketing presence among your target audience

What type of products or services do you offer?: 1) Funeral assistance plan (7 people on 1 plan for 1 price \$60 in Florida) Caribbean & Latin America is funeral and burial. United States is only funeral. Month to month to agreement. No long term contract. Legacy plan so person can be replaced.

Who are your clients, customers or audience?: Ages: 0-80. Relational sales connections and pitching virtual workshops. Church and community leaders. People with bad records. Veterans and remote home business leaders. Ex-cons. People who are economically and socially marginalized. People who don't have Dialysis, Brain tumor, terminal illness, or cancer. You look at Medical records. 40 and above

What is their geography?: The United States. They have to live in the US to have a plan.

What are their preferences?: They have not prepared for the future. They don't have enough insurance to cover the burial.

What mode of product or service delivery do they prefer?: Reaching them by phone and text and invite people to Zoom meetings.

How have you tried to reach/market to them?: Using wats up, relationship

What new changes do you want to make to your marketing strategy?: 1) Succinct Comparison & educational Videos (Your Plan vs. Insurance vs. Singular Funeral based 2) Pre-recorded & Live Webinars 3) Affiliate Partners / Independent Contractors (different demographics that affinities)

What are your unique abilities, services, products, and remarkable offerings in comparison to your competitors?: Low cost, less discriminatory based medical issues than insurance, month to month/contract, cross-regional (US, Caribbean, and Latin America), expenses paid for travel and burial

What weaknesses of your company culture and marketing are negatively impacting your client acquisition and retention?: 1) \$180 upfront & \$30 enrollment fee. (What if you finance that upfront fee with companies like <https://www.affirm.com/>). People don't like the upfront money. Some used some prepaid stuff. Plan Assure for life has a bad brand on youtube.

Years In Business : Startup

Who are your competitors?: 1) Insurance Company - State Farm, All-state 2) Senior Life 3) \$9.95 Plan

1st Competitor Website?: <https://www.coloniallife.com/> | <https://colonialpenn.com/>

2nd Competitor Website?: <https://www.seniorlifeinsurancecompany.com/>

Website in your industry that you like?: <https://colonialpenn.com/>

OPTIONAL: Another website in your industry that you like?:

<https://www.seniorlifeinsurancecompany.com/>

What do you like about these websites?: They explain things well, lots of info, talking about burial

Your Company Marketing Budget for next 12 Months?: Less than \$1K

What marketing services are you interested in trying?: SEO (Organic Growth Based On Relevant Content on Your Website), LinkedIn Advertising, Facebook Ads, Instagram Ads, Affiliate Marketing, Video Marketing, Podcast Marketing