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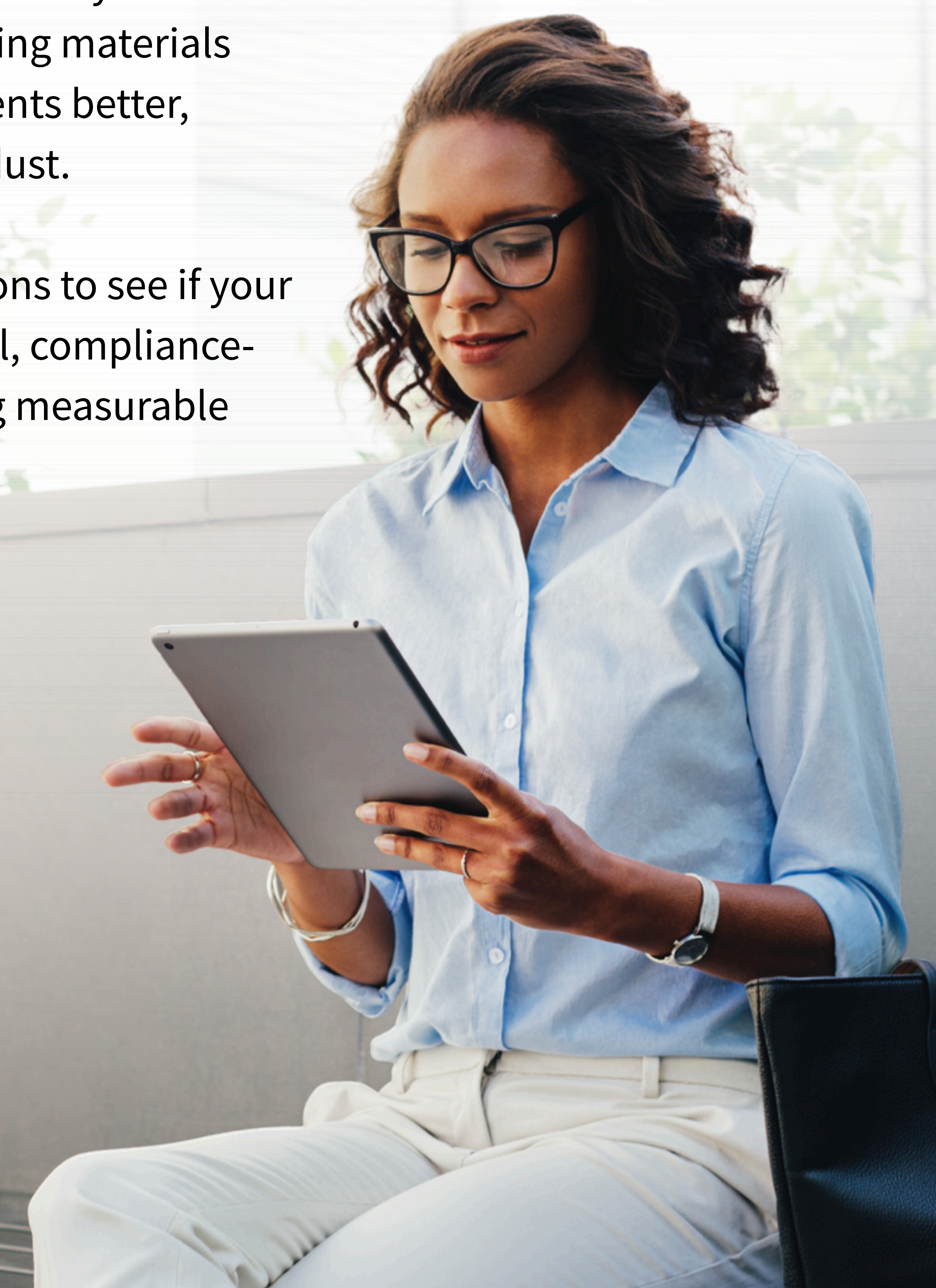
Insurance marketing audit: Is your content broker-ready?

Brokers aren’t sales reps — they’re client advocates. If your marketing materials don’t help them serve clients better, they’ll end up collecting dust.

Ask yourself these questions to see if your broker content is practical, compliance-ready and actually driving measurable results.

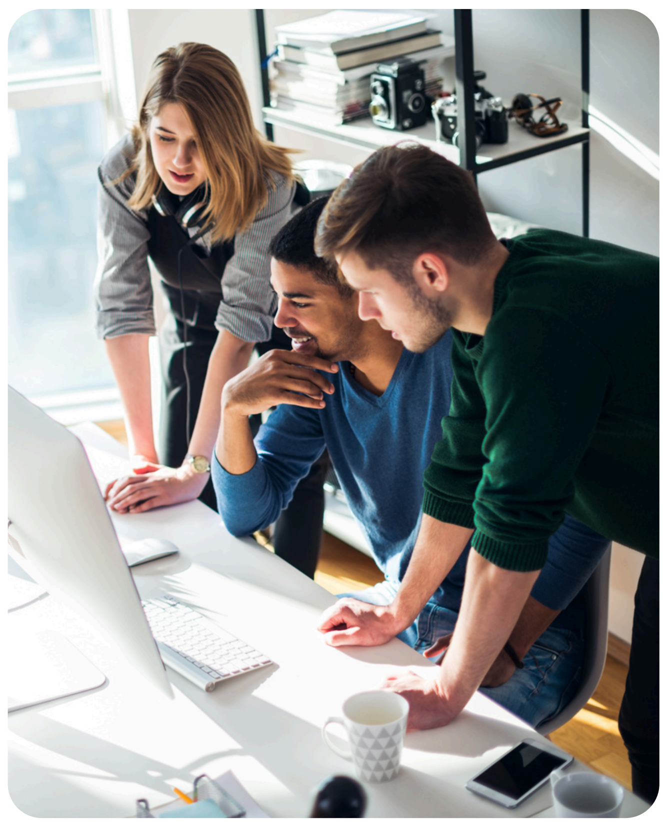


Compliance-safe content

- Does this material align with anti-rebating and inducement laws?
- Has it been reviewed for accuracy and compliance before distribution?
- Are disclosures and formatting clear and consistent across all pieces?
- Have we built a feedback loop with compliance to speed approvals, not just pass them?
- Could compliance data itself (like approved language libraries) be used as a content accelerator?

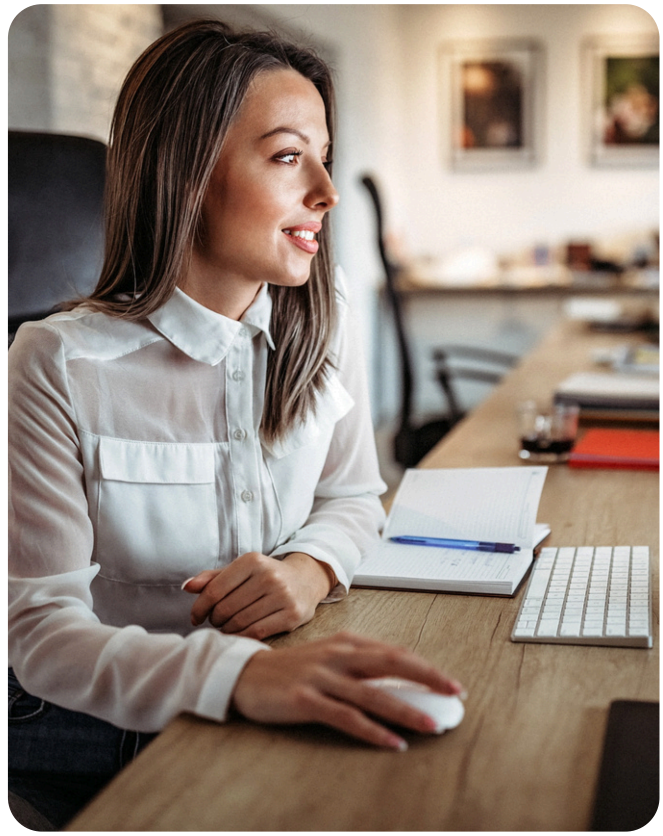
Customer-centric approach

- Does this content educate and protect policyholders, not just sell?
- Can brokers share it directly with clients — e.g., risk guides, FAQs or calculators?
- Does the messaging put the client's needs first to build trust and loyalty?
- Are we using behavioral insights or claims data to tailor messaging around real customer pain points?
- Does our content *help brokers have better conversations* with clients, not just push product info?



Plug-and-play format

- Can brokers easily co-brand or customize this material?
- Is the design professional, clear and modern?
- Is it mobile-friendly and easy to share across digital channels?
- Do we offer content in multiple formats (short-form video, social posts, interactive PDFs) to match how brokers engage?
- Are we tracking which formats brokers actually use most — and adjusting future content accordingly?



Content that moves the needle

- Will this resource help brokers improve application quality?
- Does it support risk prevention or safety initiatives that reduce claims?
- Could it strengthen renewals and open opportunities for cross-sell?
- Do we have metrics that connect marketing content to broker performance or loss ratio improvement?
- Are we enabling brokers to demonstrate value to their clients through our materials?

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Getting the timing right

- Are brokers receiving fresh materials on a regular basis?
- Do they have one central hub to find and download resources?
- Are updates timed with product launches, seasonal risks or regulatory shifts?
- Is our content cadence aligned with broker business cycles, not just our internal marketing calendar?
- Do we have a system to retire or refresh outdated materials to avoid confusion or compliance risk?

The human + AI advantage

- Are we using AI to personalize and accelerate content creation?
- Is every piece reviewed by insurance experts to ensure compliance?
- Are we delivering content that's faster, smarter and broker-ready?
- Are we leveraging AI insights to identify content gaps by region, line of business or broker type?
- Are we tracking how AI saves time or improves quality and reporting that value back to leadership?

The bigger picture

- Does our broker content strategy ladder up to organizational KPIs (retention, loss ratio, growth)?
- Are marketing, distribution, and product teams aligned on what “broker enablement” really means?
- Do our brokers see us as a trusted partner or just another carrier competing for attention?
- Are we budgeting for broker enablement as a revenue driver, not just a marketing expense?

How did you do?

If you answered “no” to more than a couple of these, your broker enablement strategy might need a refresh.

Discover what’s possible when your content is truly broker-ready.

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