



# AFFINITY NETWORKING FOR AGENTS

## Pitch Deck Template



### What is the goal of your pitch deck?

Your pitch deck is a presentation you bring to the first meeting with each potential affinity partner. It helps your potential affinity partner see the value you offer, your ideas for collaboration and how working together can benefit both organizations — and your audience!

### Before You Create Your Pitch Deck

As you get ready to get started with affinity partnerships, make sure you have:

- Assessed your own business and what you offer — a great way to do this is with a SWOT: Strengths, Weaknesses, Opportunities, Threats analysis
- Identified types of organizations who may be good partners and have overlapping audiences
- Brainstormed ideas for collaboration and marketing opportunities
- Started reaching out to potential affinity partners to set up meeting times

**Before you have your first meetings, you need to create an effective pitch deck!**



## Creating Your Pitch Deck Template

First, you'll be creating a *pitch deck template*. Then, you'll use that template to create a unique pitch deck for your meeting with each potential affinity partner.

Here are key elements to include in your **pitch deck template**. Each of these sections can be on its own page, with space to add more information or fill out ideas as you work.



Include your business information:

- Community connections
- Your goals as you serve clients

Specific things you can offer and what you'd like to request in return. This could include:

- Add to each other's websites' local resources section
- Sponsor an in-person event where clients can mingle

How your offerings can benefit their business, their clientele and their audience.  
For example:

- Easy-to-understand information about insurance
- Increased customers to their business location
- Greater visibility for their enterprise



Ideas how you both can keep the affinity partnership simple and easy to maintain.  
For example:

- Monthly email or phone check-ins
- Periodic in-person meetings to re-assess goals and collaborations



Demonstrate how you work with clients and what you offer to them:

- Your top business values
- The population you serve
- Products you offer
- How the client onboarding process looks
- Practices you avoid, such as cold calling or door-to-door sales



Check on each of your relative capacities for affinity partnership — do you have time for this collaboration?

When time is limited, see if you can come up with simple projects that take little time and effort.

For example, they might have a social media following while you have a good email list. Let them know you can easily send a message to your entire client list, and they might be able to do the same on their social accounts.





## Creating Your Pitch Deck Template Continues

Include your Personal Agent Website, your working hours, your email and phone number.

You can also include your personal interests and hobbies, if they're relevant.





## Powerful Tips for Your Pitch Deck

Keep your pitch deck fresh, current and updated for each potential affinity partner.

Make a new copy of your pitch deck from your template, and go through each section one by one to decide how you can customize it for this organization.

**Customization example:** You'll want to tailor your ideas very differently for a CPA compared to your local senior center. The CPA's clients might want opportunities to add new insurance policies to protect their finances, while senior center clientele could be interested in having local guidance for C-SNP Medicare plans. No two groups are alike and they all will have overlap and outliers — *make sure your presentation is inclusive and helpful to the potential audience.*

## Finishing Up

Put the finishing touches on your deck as your meeting approaches:

- Look over the whole thing from start to finish.
- Try to anticipate questions that may come up so you have an answer.
- Have next steps ready — a project or an event — so you can begin today!

## Congratulations, you're ready to grow!