



# How to Use This Playbook

This playbook is designed to be used, not simply read.

Work through the sections in order, fill in the worksheets as you reach them and keep the system simple enough that you can repeat it every week.

You are not trying to build a complicated marketing operation overnight. You are building one practical system that helps you find appropriate opportunities, start relevant conversations, follow up consistently and measure what actually happens.

## The four rules

### 1. ONE MARKET

Choose one primary audience you can legally, ethically and realistically serve.

### 2. ONE OFFER

Give that audience one clear reason to begin a conversation.

### 3. ONE PATH

Use one approved intake or booking process so interested people always know what to do next.

### 4. ONE SCOREBOARD

Track activity, consultations, outcomes and next actions instead of relying on memory or vanity metrics.

## How to work through the guide

1

### Set up.

Confirm your license, appointments, approved wording, contact process, booking path and tracking system.

2

### Find.

Build your opportunity map and identify appropriate places where relevant conversations can begin.

3

### Invite.

Share useful information and give interested people one clear next step.

4

### Follow through.

Respond, follow up, hold consultations and document what happens next.

5

### Review.

Look at your scoreboard every week and improve the weakest stage of the process.

### Do not try to perfect the entire system before starting.

Complete the next useful step, record what happens and improve from real experience.

**ONE OFFER. ONE LINK. ONE SCOREBOARD.**



FROM THE AUTHOR

## Introduction

When I became a licensed life insurance broker, I quickly realized the license was only the beginning.

Studying for the exam, I would do practice tests right after I finished a topic. I kept adding questions from the previous sections as I went, so I was constantly reviewing, and I took a simulated exam every week of the prelicensing course. It wasn't complicated. It was a routine I could repeat, and it worked.

Building a business takes the same kind of routine, and I had to learn it from the ground up. I don't have a particularly large family network to reach out to, so the first thing I did was research how the best salespeople in the field approached and improved their craft. Then I told friends, family and coworkers about my new business, without trying to sell them anything.

The senior advisors I've worked with have always said the same thing: network with, learn from and shadow the more experienced members of your agency and team, and care for your clients' needs as best you can. Their advice, plus a lot of trial and error, turned into the simple approach in this playbook.

I wrote it for brokers and agents who are starting where I started: motivated, but looking for a clear direction on where to begin. I hope it shortens your learning curve, gives you steps you can put to work right away and helps you build a consistent pipeline of your own.

Thank you for taking the time to read it, and good luck as you get going.

**Frank DiMasi**

# Build Your One-Market, One-Offer System

Make it easy for the right person to understand who you help, what question you help organize and what they should do next.

## 1. MY MARKET

Primary audience: \_\_\_\_\_

State(s) or territory where I can serve them: \_\_\_\_\_

Why this audience makes sense for me: \_\_\_\_\_

Where I can realistically reach them: \_\_\_\_\_

## 2. THE QUESTION

What common question, problem or life event brings this audience into a conversation?

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## 3. MY FIRST OFFER

Consultation / resource name: \_\_\_\_\_ Length: \_\_\_\_\_

What the person should gain from it: \_\_\_\_\_

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## 4. COMPLETE THE OFFER FORMULA

I help: \_\_\_\_\_ get clearer on: \_\_\_\_\_

through a: \_\_\_\_\_ so they can decide: \_\_\_\_\_

### MY ONE-SENTENCE OFFER

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## 5. ONE CALL TO ACTION

My exact call to action: \_\_\_\_\_

My intake / booking link: \_\_\_\_\_

## 6. APPROVAL CHECK

☐ Audience approved / permitted

☐ Offer wording approved

☐ Title and bio approved

☐ Required disclosures added

☐ Booking path tested

☐ Contact process confirmed

Promise clarity, not guaranteed savings, approval, results or returns.  
Keep the same offer long enough to learn whether it works.