

PC26

Trustmark
Producer Conference
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AMPLIFY

Trustmark 

Prospecting: How Marketing and Sales Make the Perfect Duo



Kelly Marcus

Regional Sales Director, Capital Region
Trustmark Voluntary Benefits

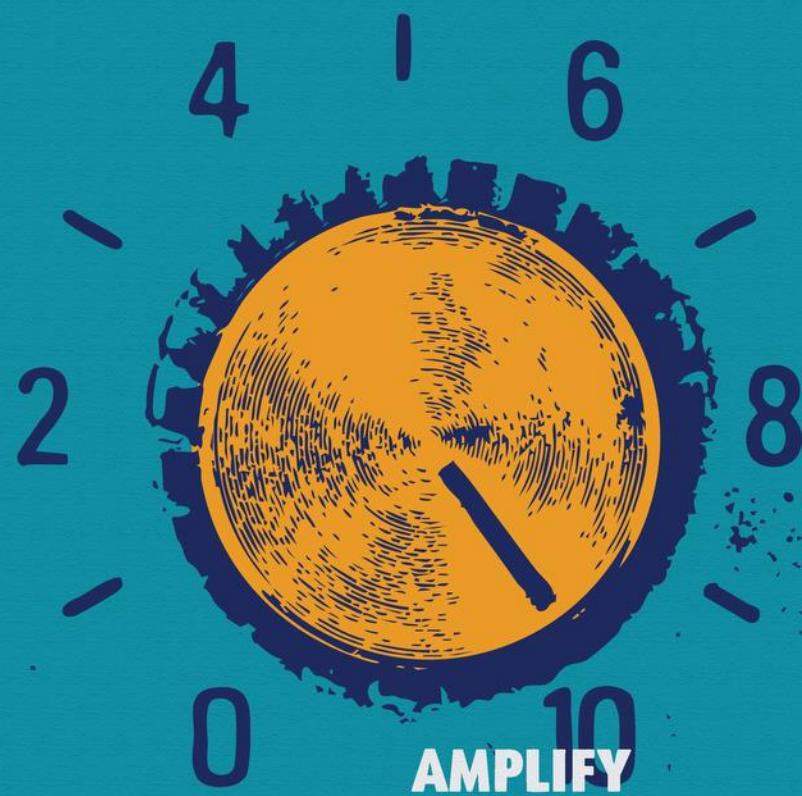


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Director, Broker Marketing
Trustmark Voluntary Benefits

Sales and Marketing is sometimes a numbers game.

We think that's particularly true when it comes to prospecting.





176,964

Source: NAICS. Counts by Total Employees. 2024

Has Anyone Here Hosted a Lunch and Learn With a Prospect? Would Anyone Like To?



Does Anyone Know Who This Is?



Joey Chestnut Can Eat 70 Hot Dogs in 10 Minutes

- Let's play the numbers game, how long would it take Joey to have lunch with all those potential business prospects?



The Numbers Game...

How Quickly Can Joey Knock Out His Lunches (never mind the learning)?

- 176,964 prospects
- 70 hot dogs in 10 minutes
- That's 420 hot dogs per hour
- 176,964 divided by 420...

421 hours (17 and a half days)

A More Reasonable Rate



- At a more reasonable rate of 30 minutes per lunch and learn?

3,686 days (10 years)

Does This Sound Ridiculous? Effective as a Prospecting Strategy?



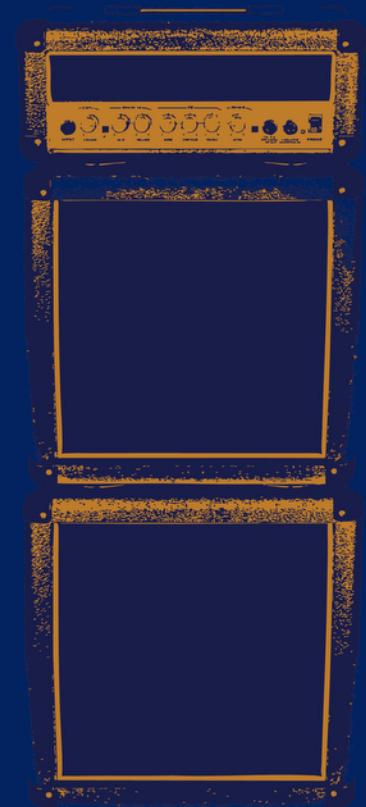
But So is Any Prospecting Effort Without a Solid Strategy

Especially One That Doesn't Include Collaboration with Marketing!



Today's Discussion

1. Sales and Marketing – 2 Paths, 1 Goal
2. The Need For Prospecting Today
3. 4 Ways Marketing and Sales Work in Harmony on Prospecting



Great Duos

In Music and In Business

- Complement each other
- Each have their unique strengths
- Share similar goals
- Understand one another

Our case for success in prospecting is all around the relationship between sales and marketing – our favorite duo.

But this is Nashville!

While you learn about our favorite duo, we'll test you on some well-known musical duos!

Can you name that duo?



The Need for Prospecting Today



The Importance of Prospecting Today

- Everyone's buying everyone
- Improve close ratios
- Prospecting helps you sharpen and hone your message
 - Be in love with the problem, not the solution!
- Driving enrollment outcomes starts early



Catering to Diverse Needs



Messages Differ Based on Audience

- Brokers to Employers
- Enrollment Firms to Brokers/Producers
- How specific is your message?
 - Existing case adding a product
 - Virgin cases
 - Benefit-savvy vs. Less familiarity
- What industry are you working in?

Can you name that duo?



A Dynamic Duo:

4 Ways Marketing and Sales Work in Harmony on Prospecting



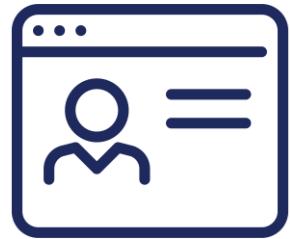
4 Ways Marketing and Sales Work in Harmony on Prospecting



Identify Your Audience



Educate First



Personalize the Solution



Make It Scalable

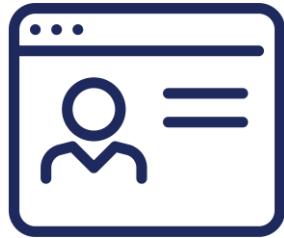
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Identifying Your Audience



- The first step is finding an audience
- We discussed the 170k+ opportunities, but how do you identify the ones to target?
- Knowing who we want to target is half the battle, no one wants to waste time chasing the wrong prospects
- Sources to consider:
 - Your own databases
 - LinkedIn
 - Your own book of business
 - Lead generation

Generating and Qualifying Prospects With Marketing



Expand Your Audience

- You have a list of contacts, but why not find more?
- Or, if you have contacts, why not help educate them while determining who's ready for further action?
- Trustmark can help you create co-sponsored:
 - White papers
 - Webinars
 - Infographics

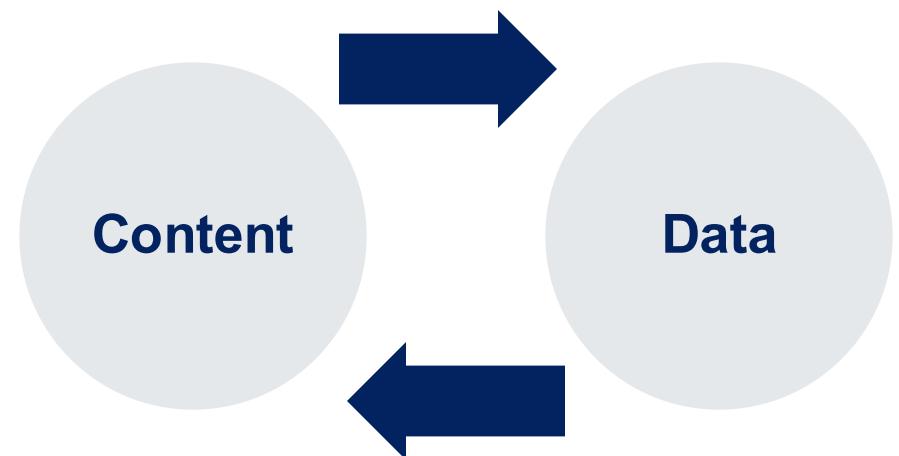
A Bit More on Effective Lead Generation Programs

How To Make it Work

- Cast a wide net
- Gate content – it's a transaction of sorts
- Trustmark can provide content, but some lift is required for your team internally
- Generating leads is great – follow up is the key though!

Use our expertise – there's a whole world of strategy around targeting programs like this via social media and other digital advertising.

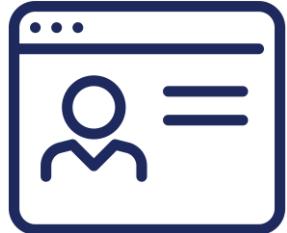
We Provide: **Content** Prospects pay with: **Data**



4 Ways Marketing and Sales Work in Harmony on Prospecting



Identify Your Audience



Personalize the Solution



Educate First



Make It Scalable

Educate First

Right Time, Right Message

- Demonstrate thought leadership
- Provide resources and fodder to fuel conversation
- Open eyes with relevant statistics and anecdotes
- Get their attention – break through the clutter!
- It can be hard to lead with product; you need to educate on the need first



Marketing Collaboration Tools

Introducing the Launchpad



- **Website:** www.trustmarkins.com/launchpad
- **Login:** Your email
- **Password (case sensitive):** TrustmarkVIP



Can you name that duo?



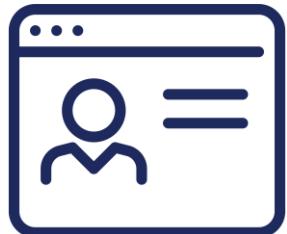
4 Ways Marketing and Sales Work in Harmony on Prospecting



Identify Your Audience



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Personalize the Solution



Make It Scalable

Personalize the Solution



Build a Connection

- Education is great, but you want to form a personal connection – be the leader
- You have the relationship, you're introducing a carrier, how can we make that more streamlined
- When you're starting to talk solutions, we want a prospect to feel the solution is:
 - Personal from you
 - Personal to their needs

Building a More Meaningful Program

Segmentation Packages

- Easily target a given industry with ready-made messaging
 - Municipalities/Public Sector
 - Healthcare
 - Education
 - Manufacturing
 - White collar/Private Industry
 - Unions
- Packages built including:
 - Flyers
 - Case studies
 - Emails
 - Presentations



Making It Personal With Marketing

A Library of Ready-made Materials

Supporting Mental Health with Voluntary Benefits

[Broker Logo]

In today's environment, employees are more stressed than ever. That stress can affect their well-being, it can affect their productivity and can lead to more serious mental and physical conditions. Fortunately, [Broker Name] can offer solutions through Trustmark Hospital StayPay®, Paycheck Protect® and Critical HealthEvents®.

Three solutions to support mental health

Trustmark Hospital StayPay® Insurance
Trustmark Hospital StayPay provides balance to the out-of-pocket costs of a hospital stay, including admission for mental health.

Admission to a hospital for **mental wellness or addiction recovery** are treated as normal triggers for the base confinement and admission benefits.

- Brokers can choose from a variety of benefit levels to make sure employees have the mental health protection that complements their medical plan.

It's not just about admission and a hospital stay, we provide **benefits for rehabilitation**, too.*

- Choose a benefit amount and coverage for inpatient/outpatient treatment to complement your health plan.

Trustmark Critical HealthEvents® Insurance**
Trustmark Critical HealthEvents offers employees a lifetime of benefits for the full scope of illness.

Protection can be expanded to cover mental health conditions including Severe Depressive Disorder, Bipolar I Disorder, OCD, Schizophrenia, PTSD and Dementia.

To help curb employee anxiety in today's environment, protection is available for infectious and rare diseases, including COVID-19.

*Rehabilitation benefits are not HSA-comparable.
**Group product only

Voluntary Benefits

Trustmark
benefits beyond benefits



 [Co-brand Logo]

Changing long-term care needs

A swirl of demographic, legislative and economic factors have put the topic of care in the spotlight. To help employees prepare, it's important to understand what's driving this growing challenge.

Adding up the numbers

The growing need for care

By 2030, for the first time in U.S. history, **those above the age of 65** will outnumber those below the age of 18! 

70% of people over age 65 will need long-term care at some point in their life! 

A growing elderly population that is likely to need care means an **increased demand for care**. 

The difficulty of accessing care

72% of nursing homes say their current workforce levels are **lower than pre-pandemic staffing levels**. 

The median monthly cost for independent living facilities in the United States is \$3,065. By 2040, this could rise to over **\$4,100 a month**. 

Shrinking care resources and increased costs mean that **access to care is more difficult for employees**. 

Care is also a challenge for younger people

60% of Trustmark long-term care claims are **under age 65**! 

30% of Trustmark claims for long-term care are for conditions that are non-permanent. 

More people under age 65 require care, which adds to the demand for care and caregivers. 

Younger people are part of the care conversation

29% of Gen Z and 31% of Millennials say that they are extremely likely to consider a **life with care** combination product*. 

Millennials are the generation with the **highest level of concern about long term care**, and are most likely to be 'sandwiched' between caring for children and older adults*. 

Concerns about care are **pervasive** - conversations about care may be relevant for a wide range of employees. 

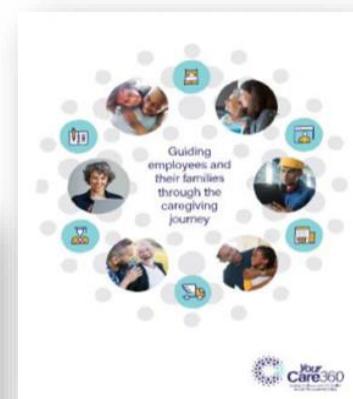
Trustmark



Building a More Meaningful Program with Marketing

Custom Programs

- Build your own voluntary benefits program with Trustmark
- We build it, you own it



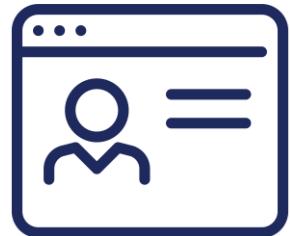
4 Ways Marketing and Sales Work in Harmony on Prospecting



Identify Your Audience



Educate First



Personalize the Solution



Make It Scalable

Lasting Solutions to Help You Grow

- You can't reinvent the wheel for each prospect
- Build solutions that are easy for you to reference back to, easy to replicate
- Think about not just your personal prospecting, but your team – how can everyone win?



Build Your Own Launchpad



Personalized Toolkits

- Start building a library of your own co-branded pieces
- Great for aligning internal sales teams
- Easily access the tools both you and your clients need

Examples From the Field

- Industry-targeted solution
 - Producer prospecting a group of education clients
 - Marketing developed communication solution to introduce a life and long-term care solution
 - Branded for the producer
 - Industry-specific messaging
- In-person CE Event
 - Producer hosting an in-person CE Event
 - Marketing developed program to support the event
 - Program name/theme
 - Invitation
 - Registration
 - Presentation content support



Can you name that duo?





Our Next Great Duo?





YOU
+
Trustmark

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Thank you!

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