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Building Your Personal Brand: Two Perspectives

Carey & Lindsay Wallace



Why Personal Branding Matters



How people
perceive you



Builds trust, credibility
& opportunity



Your differentiator
sets you apart

Why Personal Brands At Different Stages...

- Relationships open doors
- Learning together
- Opportunities come to those who show up
- Trust is everything! Clients need to feel safe and confident.
- The Know, Like, Trust factor is key to success.



If You're External....

(For Owners, Producers, and Industry-Facing Leaders)

Why Does a Personal Brand Matter?

- Enhances your industry reputation
- Builds trust with clients and partners
- Positions you as a thought leader
- Drives business growth

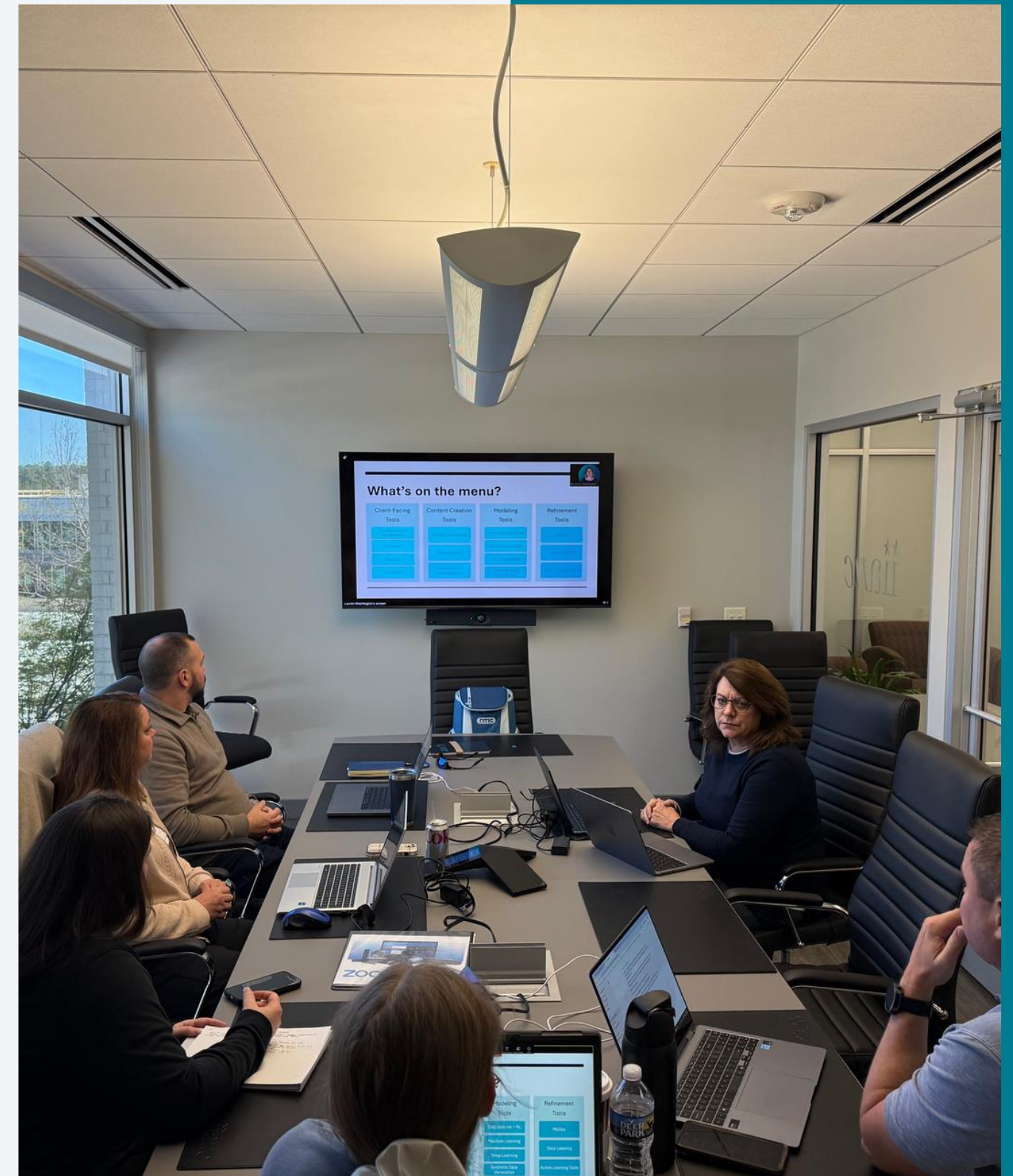


If You're Internal....



(For Admins, CSRs, and Internal Team Members)

Why Does a Personal Brand Matter?

- Creates a human connection to the company
- Increases customer awareness of you and your organization
- Builds a network
- Opens opportunities for growth



Which Would You Choose?




Lindsay Wallace

Seeking Discomfort | Helping Agencies Understand their Financials | Podcast Co-Host


Mount Pleasant, South Carolina, United States ·


[Contact Info](#)


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About


I am passionate about making a positive impact on the independent insurance industry and am always looking for new ways to grow, learn, and contribute. If you've met me you have probably heard me say that I work FOR the industry, instead of in it, which is true! I'm not licensed, have never worked in an agency, and honestly have no plans to. I use this as a superpower and take every opportunity to learn about the industry from the real superstars - those who are here doing the work!

How do I do this?


- I co-host a podcast, Insurance Refocused, where I interview agency owners, insurance professionals, industry leaders, and those who work closely with them.
- I'm the Membership Engagement & Marketing Manager at Indium, where I get to build relationships with our members, connect them to resources, and celebrate their successes.

VS




 · 1st

President/CEO | Certified Insurance Counselor

V  Ohio, United States · [Contact info](#)



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Activity


707 followers


  CIC commented on a post · 4mo

Congrats Janice! 🎉


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Experience


 **President/CEO**

 The Columbus Agency

Jul 2017 - Present · 7 yrs 9 mos

 Ohio

 **Partner**

 Insurance Agency

Apr 2013 - Jun 2017 · 4 yrs 3 mos



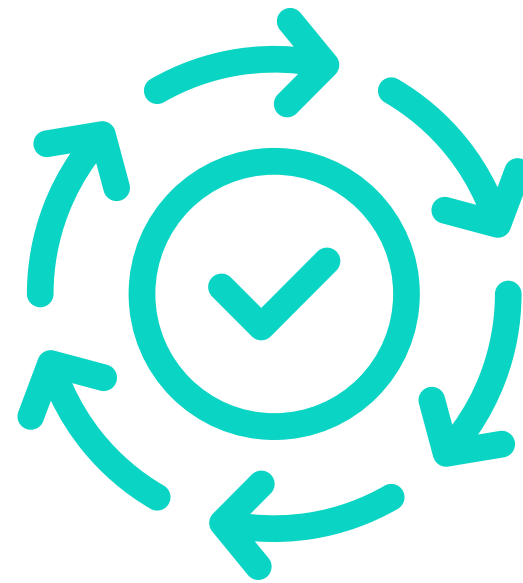
“Your personal brand is what people
say about you when **you're not in the
room.**”

Jeff Bezos

What Is a Personal Brand?



Reputation




Consistency








Visibility

Standing Out In a Sea of Buyers




Insurance SolutionsService CenterAboutContact





845-610-5700


Request Quote

Learn more about our
veteran-owned independent
insurance agency.

Request Quote

Get in Touch





Veteran-Owned

Our founder is a US Navy
teran who is here to serve



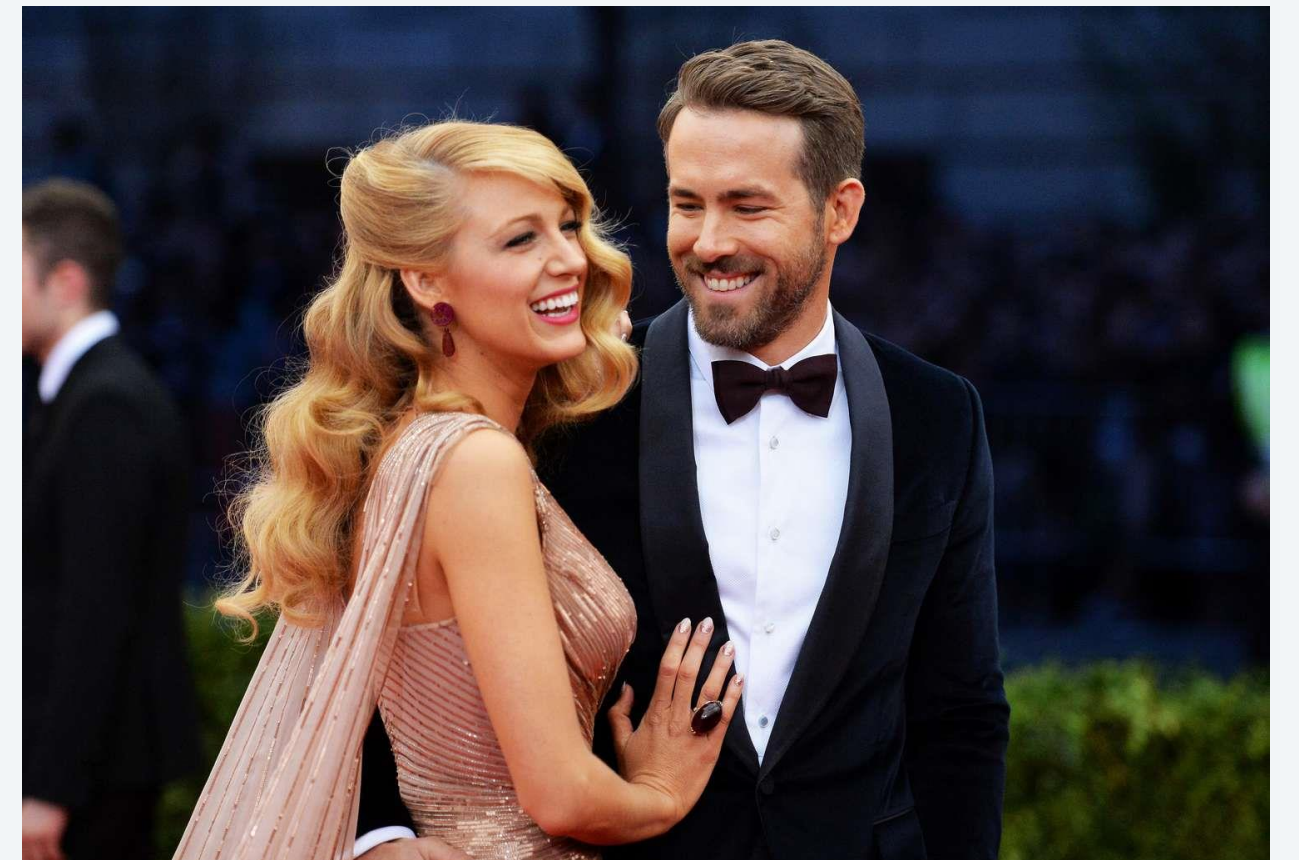
Everyone has a brand, yours brand
already exists. Are you shaping
YOURS intentionally?

Reese Witherspoon



What do you think of when you think of her?

Blake Lively




Jada Pinkett Smith



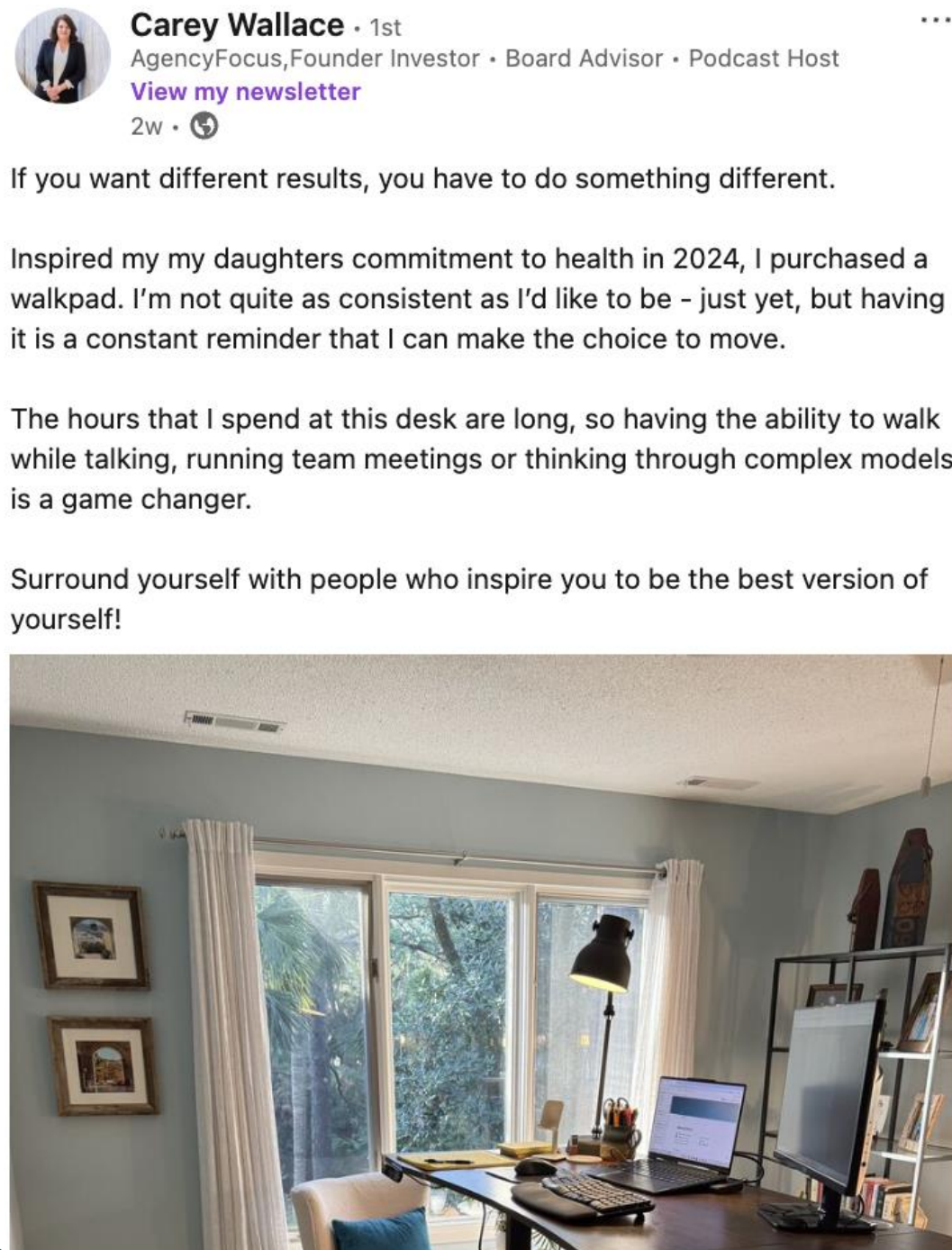
Jennifer Aniston



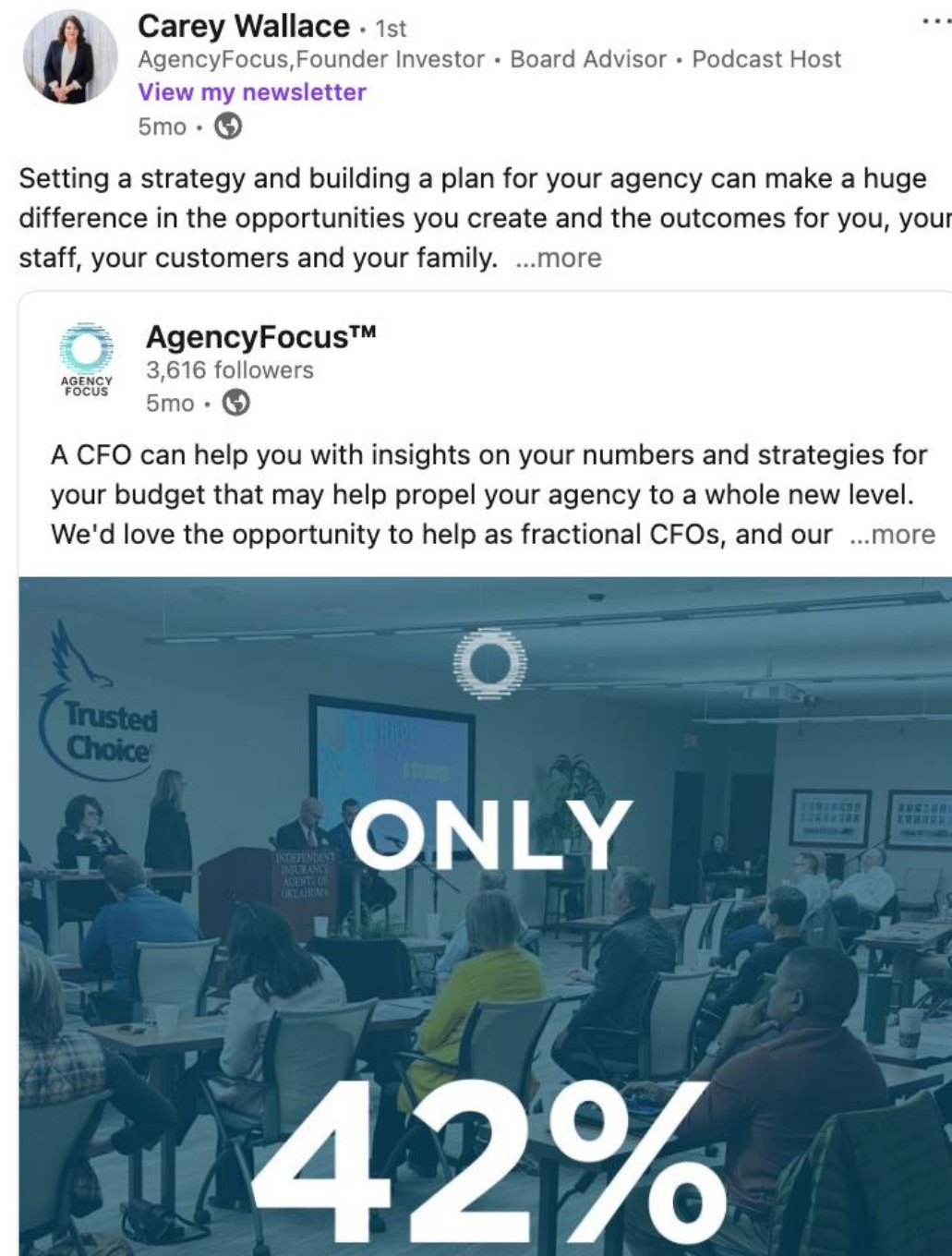
A high-angle, top-down view of a group of people, primarily women, working together at a large, light-colored table. The scene is dimly lit, with a dark blue overlay. Several laptops are open on the table, and hands are visible typing on keyboards. There are numerous papers, some with charts and graphs, scattered across the surface. Office supplies like pens, pencils, and a magnifying glass are also visible. The overall atmosphere is one of collaborative work and productivity.

These women have shaped their
brands through **authenticity and
strategy**. What will yours be?

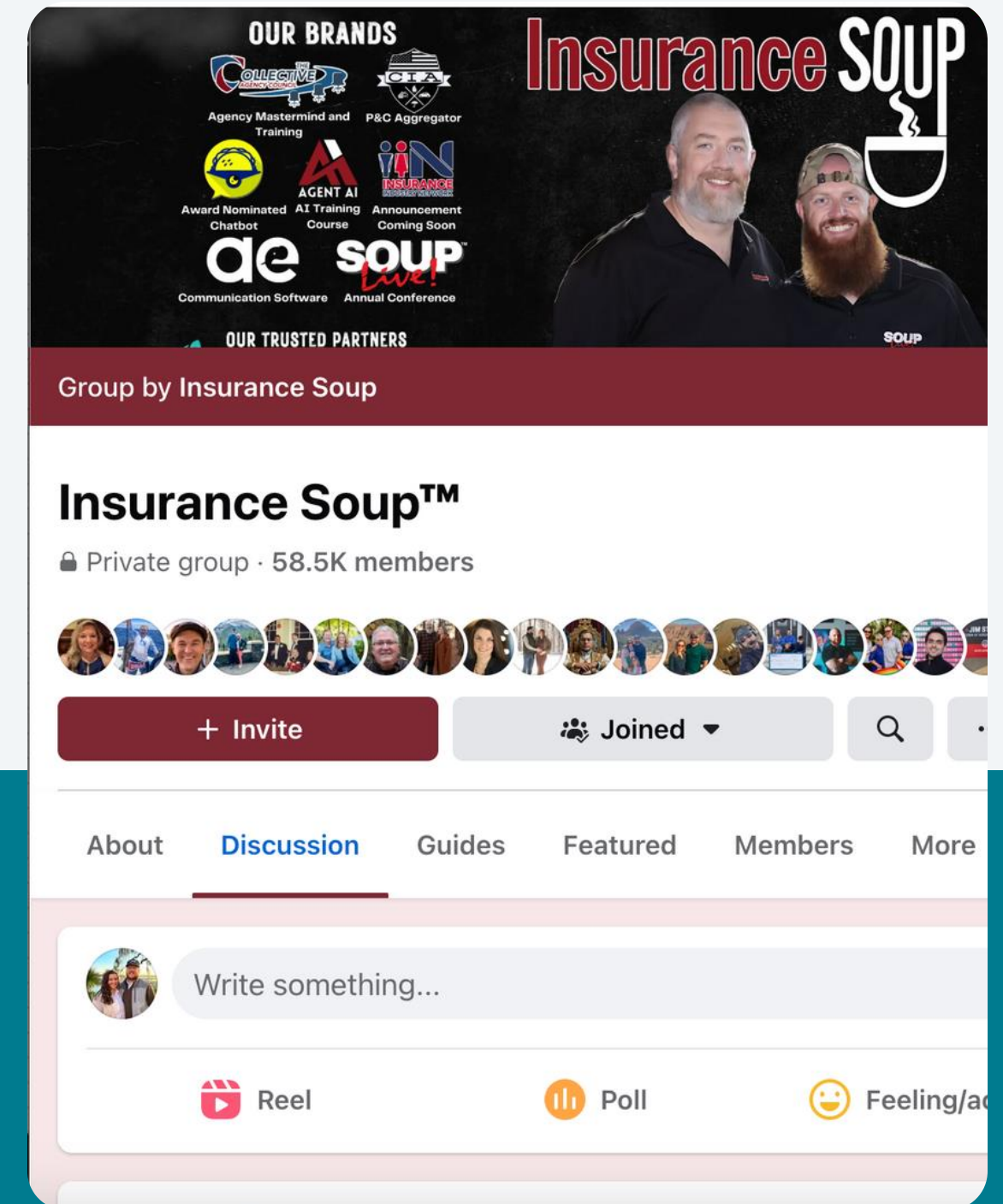
Carey's Approach



Personal/Inspo



Thought Leadership



Referral Tags

Lindsay's Approach

Lindsay Wallace • You
Seeking Discomfort | Helping Agencies Understand their Financi...
5d • Edited • 🌐

Just wrapped up an incredible leadership conference, and I'm leaving with so much to think about (and implement!).

We had the privilege of hearing from **Robert "Cujo" Teschner**, whose insights on teamwork, accountability, and resilience were both powerful and practical. Nothing like getting out of my comfort zone to grow as a leader!

Now, let's put it into action. 💡🔥

Big thanks to **Carey Wallace AgencyFocus™** & **Christopher Paradiso** for the opportunity to be in this room!

Huge thanks to **Independent Insurance Agents of North Carolina, Inc. (IIANC)** & team **Aubie W. Knight, CIC, CRM Emma Aronow Rebecca Shigley** for hosting us!



Event Recaps


Lindsay Wallace • You
Seeking Discomfort | Helping Agencies Understand their Financi...
10mo • 🌐

It's 5:45 AM & I'm sitting on the bench in front of the gym changing into my spin shoes thinking to myself, "You showed up, that's the hardest part".

I look up to this board that I read every morning, sometimes it's updates about the gym, discounts on merch, but most often it's a quote.

Today it really struck home "Success is not always about greatness, it's about consistency. Consistent hard work gains success. Greatness will come".

Took a step towards greatness today - hope you do too!



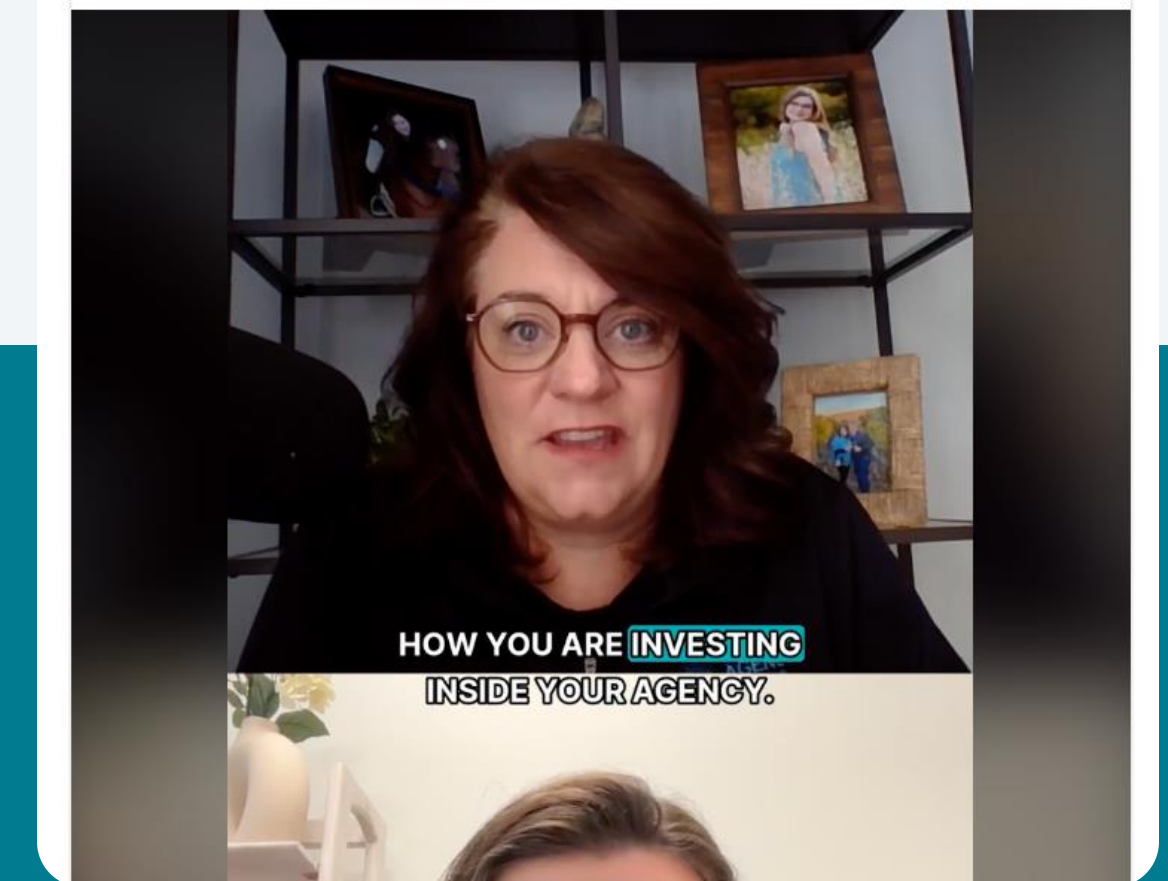
Personality/Working Out

Lindsay Wallace • You
Seeking Discomfort | Helping Agencies Understand their Financi...
4mo • 🌐

Everyone talks about process when it comes to optimizing efficiency, but often overlooks the most crucial element: the goals and direction of your agency. ...more

Insurance Refocused Podcast
1,032 followers
5mo • 🌐

It's about running your agency as EFFICIENTLY as possible.



Podcast Insights



**No one-size-fits-all approach - play to
your strengths!**



Key Lessons



Carey
Wallace

- 1 **Reputation takes time**
consistency matters
- 2 Speaking & industry involvement
build credibility
- 3 **Expertise drives authority**



Lindsay
Wallace

- 1 Content creation **accelerates visibility**
- 2 **Naivety** is a superpower
- 3 Engaging online = **powerful networking**



WORKSHOP TIME

**Now, let's craft YOUR personal
brand!**



Step 1 – Identify Your Brand

What do you want to be known for?



Lindsay – Relationship builder, fresh perspective on agency finance, making complex topics simple.

Carey – Industry expert, trusted advisor, financial strategist for independent agencies.



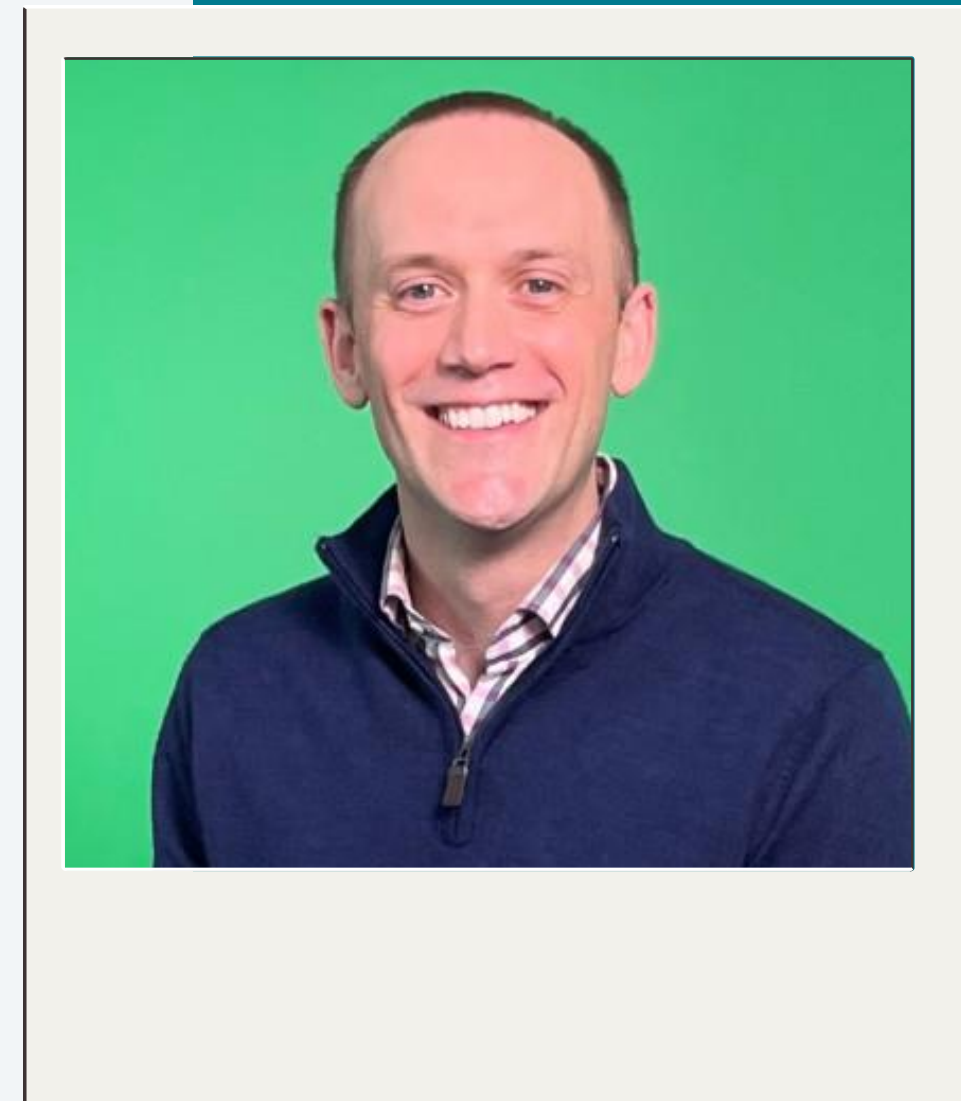
Step 2 – Define your Ideal Client Profile

Identify your ideal client!

Think of one specific client you'd want to duplicate over and over again.

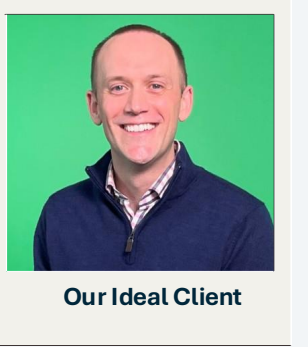


Our Ideal Client



Landon Bentham

Step 3 – Meet Your Clients Where They Are

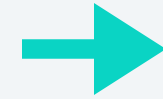


Why should they listen to you?



Landon just took over his family agency and wants to make confident financial decisions.

What are their problems?



He's unsure how to manage cash flow, build his staff, and position the agency for growth and scale.

When are they experiencing these problems?



Right after taking over and when setting financial goals for the year.

Where do they spend time?



In-person at events, LinkedIn, email case studies, and podcasts.

How will they engage with your content?



LinkedIn, webinars, and industry conferences.

Step 4 – Creating an Action Plan

What's one thing you can do
THIS WEEK to grow your brand?



Post one piece of content on LinkedIn



Network with a mentor or industry peer



Write an article



Reach out to industry related group/community



Update your LinkedIn profile to clearly reflect your expertise and goals.

Step 5 – Generating Content Ideas

Write down three content ideas.



01

Active Listening

Listen to the questions and pain points of your existing clients.

02

Industry Trends

Pay attention to industry trends.

03

Competitor Strategy

Look at your competitors: what are they talking about?

04

Your Development

Share your own experiences, wins, and failures.

05

Personality Posts

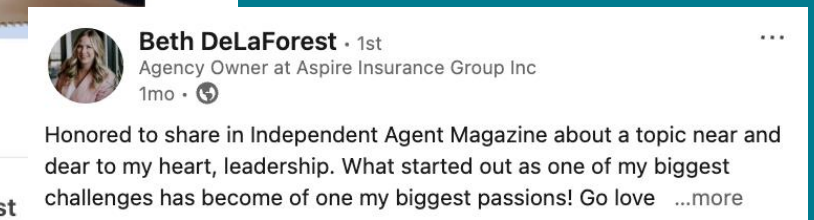
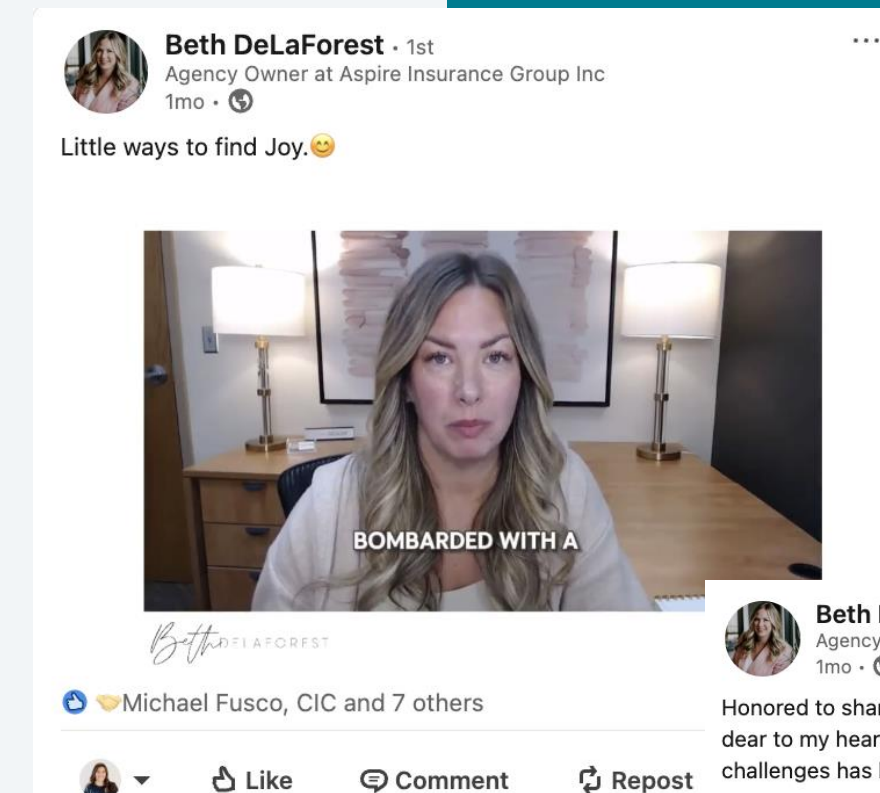
Let your clients get to know you & your team

Step 6 – The Authenticity Rule

Rules of Engagement:

- There are no shortcuts - your personal brand should be your voice.
- Balance between business and personal content

Draft one post that balances business and personal branding.



Recap & Final Thoughts

- 1 **Identify Your Brand** - Define what you want to be known for and the key traits that make you unique.
- 2 **Identify your Ideal Client Profile (ICP)** - Clarify who your audience is
- 3 **Meet Your ICP Where They Are** – Think about where they spend time, how they interact and what they need from you.
- 4 **Create an Action Plan** - Outline specific steps to start building and maintaining your brand.
- 5 **Generate Content Ideas** - Listen to client questions, industry trends, and real-life experiences to create meaningful content.
- 6 **Be Consistent & Authentic** - Stay true to your voice, show up regularly, and engage genuinely with your audience.