

5

CLEVER WAYS TO KEEP IN TOUCH WITH YOUR CLIENTS

One of the biggest myths in the sales industry is that acquiring new customers should be your main priority. Actually, most statistics prove that it's existing clients who are worth the most to your business. Returning customers buy more *and* they're more likely to tell their friends!

Ready to take *your* business to the next level? Get started with these five methods for staying in touch with your clients:

NEWSLETTERS

Once you create a good template, this one should be relatively easy. Send out a monthly or quarterly newsletter with a mix of FAQs, relevant articles, testimonials, and discount coupons. You can also add personal photos to help build emotional connections. For example, you might include a picture of a client's family with the caption "With their first grandchild on the way, Bob and Suzy are happy they just reviewed their life insurance policy!"

EMAILS

The event-based nature of the insurance industry is great for automated emails. You can create standard content that can be easily automated and sent to a range of customers when a specific event occurs. Events that would warrant an email include: clients turning 65, a lead becoming a client, client enrolling in a new plan, or an approaching plan renewal date. Checking in around these times can remind your clients that they have a reason to request an appointment!

Remember, when it comes to staying in touch, one size doesn't fit all! Make sure you contact clients using their preferred method, and do your best to gauge how often someone would like to hear from you.

PHONE CALLS

First off, make sure you only call clients who actually like talking on the phone – and only if you're good with casual conversation, too! You don't want to sound unnatural, so don't try to write a whole script. Just come up with a few bullet points to keep you on track, then go with the flow. Remember, you're not giving a sales pitch; you're just checking in to see how they're doing and what's new in their life.

SURVEYS

This approach offers a number of benefits, including increasing customer loyalty, generating repeat sales, and collecting valuable feedback.¹ Surveys are also a great way to find new sales opportunities. For example, you could ask your clients to rank their satisfaction with their coverage. Then, offer them an appropriate cross-sale product based on their response at your next appointment.

¹Demand Gen Report

CARDS/LETTERS

There's nothing like old-fashioned pen and paper! Minimize your effort by writing a simple holiday or birthday card each time you get a new client, then file it away for later. However, if you do like writing, many agents say personalized letters are actually more well-received than standard store-bought cards. Type up a few updates on your personal life around New Year's, then include a simple P.S. about questions and referrals at the end.

Learn more from the full article, "Why Client Retention Should be Your Top Priority."