

CHECKLIST:

## Cultivate the Customer Experience Your Clients Want



**What do customers want from their independent insurance agents?** The Agents Council for Technology (ACT) has developed strategies to help you tap into technology and motivate your team to provide the service today's insurance consumers want. By creating a process with touchpoints throughout the insurance policy lifecycle, your team will build relationships and **your clients will become champions of your agency and help you grow your business.**



### Be where your clients and prospects search for insurance

#### Create a robust mobile-friendly website

- Website
- Mobile-friendly
- Easy to navigate
- Digital review from Trusted Choice

#### Content strategy

- About us page
- Hours of operation
- Agency location
- Staff listing: photos, direct email and phone numbers, areas of expertise
- Community service affiliations
- Trusted Choice® logo and pledge of performance
- Blog or FAQ area to address common questions
- Articles on specializations
- Staff contributed content
- Guest content
- Content from Trusted Choice
- Testimonials and reviews

Check back for fresh ideas often: [independentagent.com/ACTCX](https://independentagent.com/ACTCX)

## Improve SEO

- Include content specialization/location
- Use keywords
- Complete “Find an Agent” profiles with carriers and Trusted Choice

## Build a social media presence

- Create complete profiles
- Follow and engage business clients
- Share new or relevant website content
- Share posts of staff/community engagement
- Look to Trusted Choice for consumer content
- Host a video series
- Promote posts and advertise in social—it’s affordable



## Create a digital presence reflective of your services and brand

### Showcase your expertise

- Set-up a blog or easy content posting tool on your website
- Post timely content on the website
- Promote it in social media
- Utilize Trusted Choice content, staff and testimonials

### Showcase your quality

- Build your online ranking
- Ask for social media reviews
- Create a response system

### Offer comparative rating

- Choose a management system and rating solution and include it on your website



## Invest in technology and processes that make purchasing easy

### Online application with minimal client data entry points

- Find the data curation resources that works for your agency
- Find the co-browsing website that works for your agency

### E-Signature

- Implement an e-signature service

### Bonus service feature: online chat assistance

- Add a chat feature to your website



## Build a relationship with your clients throughout the year

### Mobile account management and communication preferences

- Choose an account management tool
- Implement account management tool online
- Consider using text message alerts
- Track customer communication preferences

### Be proactive when life changes

- Implement a plan to nurture clients
- Recognize life changes like birthdays, anniversaries, when there's a new licensed driver, etc.

### Value added, community building services

- Let clients know of current community activities
- Host shred events or safe driving courses
- Highlight advocacy and community commitment in all communication channels

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## Assess clients' needs and modify service accordingly

### Be proactive with renewals

- Update customer profiles
- Provide a proposal with comparable quotes, rate increase explanations

### Create a positive claims experience

- Provide clear process and after-hours options for reporting claims
- Brief client throughout the process
- Follow-up upon resolution
- Act on behalf of the client should an issue arise
- And if denied, help them understand why and work through the experience



## Ask for online reviews and referrals

### Reviews

- Make reviews and ratings easy for clients
- Include an ask for review or rating when it makes sense
- Thank clients that leave reviews/ratings
- Respond swiftly to all reviews/ratings

### Video Testimonials

- Use your smart phone, DSLR or other equipment to record video testimonials
- Post them on the web and social

### Blog posts and written testimonials

- Ask clients with audience that reaches your target to mention your services or their experience with your agency in a blog post

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