

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

Improve SEO

Check back for fresh ideas often: independentagent.com/ACTCX

- 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 revals

- 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