

CSE CHECKLIST – “BE PROFESSIONAL AND TRUSTWORTHY”

	<p>Listen to your prospective clients to learn what they need. Once you’ve discerned and confirmed what the client needs, write a proposal for new business, which should clearly include:</p> <ul style="list-style-type: none">• A lead paragraph summarizing the prospective client's needs and problems.• A second paragraph with a solid presentation of how your business can provide solutions. The key here is to promise solutions you can deliver.• All winning business proposals clearly outline the benefits to be gained from doing business with you. If your business offers complete confidentiality and can meet tight deadlines, state it in your benefits section.• You also need to outline your agency’s differentiators. You must show how you’re different (i.e., better) than competitors.• Proposals for new business should clearly explain coverages and options.
	<p>A professional, customized agency brochure should be used for proposals and should also be available on your web site.</p> <ul style="list-style-type: none">• Clearly state differentiators.• Include agency history, such as agency involvement in the community.• Describe agency specialties.• Include testimonials from satisfied clients.• Google “professional customized agency brochure” to explore affordable, downloadable brochure templates.
	<p>An alternative to an agency brochure is an agency folder, a 9 x 12 file folder or portfolio, perhaps with pockets, printed with your agency’s logo and tagline, into which you can tuck the insurance product pages that relate to your prospective client.</p> <ul style="list-style-type: none">• Cross-sell by tucking personal insurance pages into a folder for a commercial lines client.• Don’t just leave the piece, go over it with the client and field questions. The extra time this takes means it’s more likely the client will look at the folder again and choose your agency, which justifies the expense of printing the folder.



	Maintain branded insurance product pages that explain each product type for both commercial and personal lines, and their different levels. The pages should be formatted within your agency's proposal template and carry your logo and tagline.
	Print a calculator on the back of each product page, and point it out to clients, so they can figure out for themselves how much insurance they need, if they prefer.
	Post these insurance product pages on your web site. Update as needed
	Create a calculator for each product on your web site so clients can see how much insurance they need.
	In the folder, include a page with testimonials from satisfied clients.