

# the *Customer Service* experience

An Independent Agents Guide to Serving Today's Customer

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Independent Insurance Agents  
& Brokers of America, Inc.

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## **“The Customer Service Experience”**

*An Independent Agents Guide To Serving Today's Customer*

### **Six Hour Outline**

#### **Course Description**

This program examines the opportunities for an independent agency to navigate the complexity of today's marketplace through an examination of understanding today's consumer, what customer service means, the marketplace, prospecting, caring for new and existing customers, being professional and trustworthy, addressing unplanned communication and planning for the future. It provides direction that will help attendees confidently and efficiently provide meaningful, valuable and profitable customer service as a foundational component of their business.

#### **Learning Objectives**

At the conclusion of this seminar, attendees will be able to:

- Understand how today's insurance marketplace has changed how customer interaction needs to adapt.
- Build stronger customer relations for any staff that has frontline contact, either face to face or via telephone, email, chat, forums, social media, etc.
- Increase revenue through customer retention efforts, referrals.
- Explain the difference between traditional and new marketing and most appropriate agency direction.
- Explain and reinforce the value of an independent agent to new and existing clients.
- Develop a detailed social media plan to support agency marketing efforts.
- Address and resolve customer complaints effective and efficiently.
- Maintain a high level of professionalism through refined customer service and ethical obligation.

## **Introduction (5 minutes)**

### **Chapter 1: Meet Today's Insurance Consumer (25 minutes)**

- Social Technographic Groups, Percentage of Population, What They Do
- Traditional Marketing vs. New Marketing
- Steps to Learn More About Existing Customers

### **Chapter 2: Bring Real Meaning to "Customer Service" (30 minutes)**

- See Service From Customers Point of View
  - Step One: Consider What's Required Throughout Customer Lifecycle
  - Step Two: Convey the Benefits you Provide as an Independent Agent
  - Step Three: Have a Consistent Strategy
  - Step Four: Design Your Service Evaluation Process
- Where Did Your Customers Go?

### **Chapter 3: Know Your Agency (30 minutes)**

- Define Who You Are Staff Awareness
  - Culture
  - Core Values
  - Goals
  - Vision and Mission
- Create a Customer-Centric Agency

### **Chapter 4: Understand Your Marketplace (30 minutes)**

- Communication
- Carrier Role
- Information Sources|
- 10 Things You Need to Know About Your Customers

### **Chapter 5: Motivate Your Team (15 minutes)**

- Keys to Motivation
- Employee Job Satisfaction Feedback Script

### **Chapter 6: Prospect Effectively (40 minutes)**

- Traditional Marketing Methods
- Capitalize on Internet Marketing
  - Agency Websites
  - Social Media
- Referrals
  - Obstacles
  - Methods
- Listening and Offering What Prospective Customer Needs
- Community Building and Engagement
  - Definition of Community Building
  - Engagement
  - Content Marketing
  - Content from Outside Your Agency

## **Chapter 7: Care for New Customers (30 minutes)**

- First Meeting Considerations
- Five Simple Things That Can Make A Difference
  - Share Your Insurance Knowledge
  - Inquire, Listen, Communicate, Adapt
  - Thank Your Customers
  - “Customer Care” Events
  - Be Active In Community and Give Back

## **Chapter 8: Retain Customers and Grow Your Book (30 minutes)**

- Retention as Sales Strategy
- Social Media and Client Retention
- Lifetime Value of a Customer

## **Chapter 9: Be Professional and Trustworthy (15 minutes)**

- Tips to Build Trust
- Tactics to Build Trust

## **Chapter 10: Be Ready for Unplanned Communication (25 minutes)**

- Complaining Customers
- Social Media Scars
  - Negative news
  - Professional Response to A Negative Review
- Disaster Communication

## **Chapter 11: Plan for the Future (20 minutes)**

- The War For Talent
- Your Customers Are Going To Be Different
- Learn About Industry Disrupters
- Staying Social
- Monitor and Measure

## **Conclusion (5 minutes)**

**Total Contact time** = Minimum 300 minutes (This represents a 50 minute hour, accounting for breaks.)