



“If you have an account you are excited about, chances are that other agencies could have the same client submission sitting on their desk.”

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Five “Best Practice” Tips That Will Net You More Business

We generally say we know what to do and how to do it, but do we always take our own advice? Are we always remembering the top tips and best practices that make us successful? Not likely, I’d wager. The day gets busy. The market is changing. A client is being difficult. You need order, relief from the chaos around you. To that end, here are a few “best practices” to help you through the day and through your sales. Write these down, print them out, and keep them in the front of your mind.

- 1) **Handwritten Thank You Notes:** Remember when this was the norm? Why did we stop doing this when we knew it was so effective? Oh yes, email came onto the scene. We need to bring that personal, warm touch back.
- 2) **Know How To Submit And Sell To A Carrier:** Move your submission to the top of the underwriter’s desk and you will likely get better pricing and a quicker response. That’s what your clients want. Not every carrier is created equal and not every rating has the same price. Let Elite Marketing teach you why and when to use a particular carrier.
- 3) **Communication:** If you have an account you are excited about, chances are that other agencies could have the same client submission sitting on their desk. Communication can certainly set you apart from those other agencies. The quoting process, especially for complex accounts, can take several days or even weeks. Don’t keep your client in the dark until you hear back from all your carriers. Send them updates to keep them “in the loop.” It can make all the difference.
- 4) **Drip Marketing:** Agents should provide a continual “drip” of information to their customers. Email newsletters throughout the year to help build trust and confidence. As an example, your email could include back-to-school information, or you could send something about market changes. Be a resource throughout the year by providing information that clients find useful.
- 5) **Be Bold:** Do things differently. If it doesn’t work, so what? You tried something new and learned from it. At the very least, you will set yourself apart from everyone else by becoming more memorable. The next time you try something, use what you learned. Regroup and try again.

We don’t have to reinvent the wheel. Our industry doesn’t have to be so complicated. Communicate with clients regularly, keep them informed, be a resource for them, and be invaluable. These five best practices are just a starting point: I’ve got a hundred more to share!