SENIOR MARKETING SPECIALISTS UNIVERSITY

SENIOR MARKETING SPECIALISTS

Client Retention

Providing better service for your clients

Senior Marketing Specialists University
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We need to talk about retention. Here are 3 reasons why:

1 Year two commissions are profitable

Year two commissions are *much* sweeter than year one. In fact, commissions typically do not turn profit until year two – first year commissions will typically cover client acquisition costs.

2 It is more cost effective to maintain your current book of business

It is 6-7 times more cost effective to maintain your current book of business than it is to acquire new clients. This squashes the myth that retention is expensive - at least in comparison to lead generation.

3 Your clients are another agent's prospect

If you are not keeping yourself in front of your clients, another agent will. Checking in keeps them up to date with your services and reminds them that they are more than just a sale.

Your clients should be contacted by you *at least* 7 times a year.

As far as retention goes, 7 is the magic number – it is enough to consistently keep yourself in front of your clients without becoming negligent.

seven contacts.

QUARTERLY NEWSLETTERS

Newsletters cover 4 out of the 7 contacts a year! They are a simple way to keep your clients engaged and informed. If you're not sure what to include in your newsletter, check out the Senior Marketing Specialists AMP Program.

Email is the easiest way to send out newsletters. There are numerous email programs available to help structure and simplify the process, such as Mail Chimp and Constant Contact.

APPOINTMENTS & REVIEWS

Before you end one appointment, your next one should be scheduled.

Services that require multiple contacts, like doctors and dentists, have realized scheduling the subsequent appointment at a current visit vastly increases the client's return. This works for insurance agents as well.

"Your new coverage will start on [DATE]. Once you are settled in your plan, I will come back out and review any of the documentation they sent you and make sure you are using the plan in full. Do Tuesdays work for you? Morning or afternoon? I will be back out [DATE/TIME] for a review. I will email you a confirmation 1 week prior in case something comes up and you need to reschedule."

AMP PROGRAM

Senior Marketing Specialists offers the Agent Marketing Portfolio (AMP) Program, giving you access to quality marketing materials you can personalize and send out, including a quarterly newsletter, for FREE!

seven contacts.

Handwritten Cards

Cards are a great way to let clients know you are thinking about them. Sending out one of each card below covers 3 of your 7 yearly contacts.

Holiday Cards

Get creative! Have you ever received a St. Patrick's Day card? Probably not - but if so, you remember it. Sending non-traditional holiday cards can be a great way to leave a mark in the mind in your client.

Birthday Cards

Who doesn't love to get a card in the mail on their birthday? Let your clients know you're thinking of them on their special day.

Thank You Cards

After each enrollment (or initial meeting), send out a thank you card. A handwritten thank you card shows you took extra time and truly appreciate the meeting.

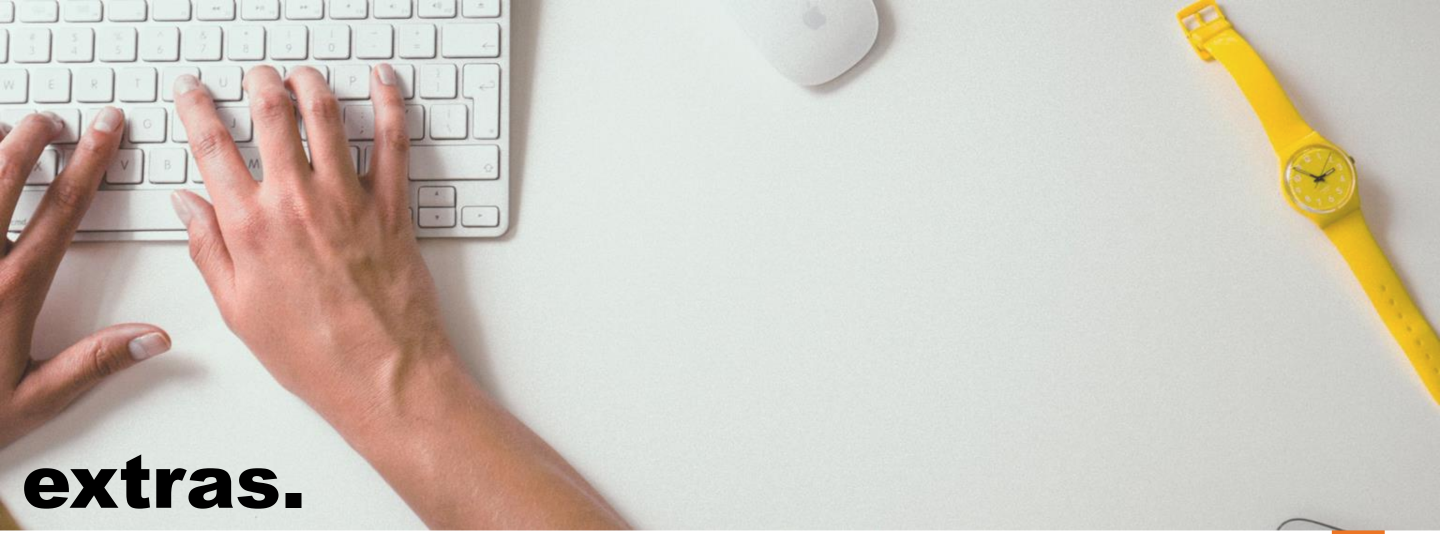
handwrytten

Don't have time to handwrite your cards? *Handwrytten* is a service that will write and mail your cards for you.

Events

Events can be anything from seminars to client appreciation events. Face-to-face contacts are going to build your relationship much quicker than other contacts.

Have you ever considered a partnered seminar with another professional, like a financial planner? This can a great way to get your name in front of your professional partner's clients while assisting with other concerns of your clients.



Facebook

Though social media **does not** count as one of your 7 contacts, it is a great way to stay connected with your clients on a day-to-day basis.

If you are posting interesting information 3-5x's a week, as recommended, you will have endless quality contact with your clients, vastly increasing your retention and engagement!

Need help with content? Senior Marketing Specialists agents can access free, industry-relevant content in the Facebook group SMS Agent Connect!

CRM

CRMs (Customer Relationship Managers) are programs used to manage interactions with your clients and are great relationship-building tools. Any contact with your clients and prospects should be noted in detail on their profiles.

Not all CRMs are built for the same purpose – some are not good options for the insurance industry. Make sure you invest the time in finding the right fit for your business.

Overwhelmed with options? Senior Marketing Specialists can help you narrow down your options.

your business partner.

You are in business for yourself, not by yourself.

Senior Marketing Specialists can:

- Assist you in ordering carrier marketing materials
- Provide additional training and educational opportunities
- Contract you with the most competitive carriers
- Support you and your office staff
- Create marketing plans
- And more…

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