

Quick Start Guide to Results-Driven Agent Marketing

This approach with Agents will set you apart from your competition. You will be able to tell which Agents care about the wellbeing of their customers. These are Agents who make great strategic business partners. They will refer you because you ask them what they want, and deliver on what they tell you.

1. Each morning review all current jobs
2. Identify which current jobs have a local agent
3. If you are not sure if the job has a local agent, find out
 - a. Check with the team leader of the job
 - b. Call the customer to inquire
 - c. Call the closest insurance agency to inquire, i.e.:
 - i. If the customer knows they have State Farm but are unsure of their Agent, call the closest State Farm office and say, “I am working a job for a State Farm customer and I am calling to see if they are your client.”
 - ii. Provide Agency with customer name
 - iii. If not their customer, ask, “Could you tell me which Agent is theirs?”
4. Once you know who the Agent is for your customer, call the Agent
 - a. With receptionist:
 - i. “Hello, my name is _____ I own _____
(company name)
 - ii. We are working a job for one of your clients and
 - iii. I have a very important question I must ask
_____ (Principle Agent Name)”
 - b. With Principle Agent:
 - i. “Hello _____ (Principle Agent Name).
 - ii. My name is _____ I own _____
(company name).

- iii. We are working for _____ (client name), your client, he/she has a _____ damage.
 - iv. I will be seeing your client later today. Is there any message I can give to him/her on your behalf?"
 - v. After Agent responds, "Will do. Is there anything else I can do for you with your customer during this job?"
 - vi. After Agent responds, "Thank you for your time today helping me better serve you and your customer. If there is anything else I or my team can do, please let us know. Have a great day."
5. Deliver/Execute what the Agent told you to do
- a. This might be accomplished over the phone with the customer
 - b. This might require a site visit and face-to-face conversation with the customer
6. Report information back to Agent as needed, this could be
- a. After the job is completed
 - b. When the customer has a concern or question for their Agent
 - c. If the customer is having a difficult time with the loss
7. Always end by thanking the Agent for the opportunity to serve them and their customer

Have questions? Want to share your results? Need More?

We'd love to hear from you: 615-948-3065

If you like this guide and found it to be effective in boosting your referrals, you'll love our full system.

Call us at 615-948-3065