

Creating Strategic Partners

How to Team Up

Introduction: Now that you know which agents will make the best strategic partners, you must learn how to help them see you as a strategic Agency Brand Ambassador. In this lesson you will learn how to invite agents to utilize you as their Agency Brand Ambassador to 1) protect their reputation, 2) relay important information from the customer back to the agent, and 3) help the customer identify any life changes since the last visit with the agent.

For the purpose of this lesson, let's assume you have identified a strong candidate for a potential Strategic Partner using your rounds of Indicator Questions.

- a. **First things first.** You need to schedule your next appointment with your pre-qualified potential Strategic Partner. Time is one resource no one can make more of. It is valuable, for you and for the Agent. You may schedule the appointment in-person or you may call and request the appointment.

What are two or three reasons you would benefit from having an appointment instead of a "got a minute" meeting with the agent?

1. _____
2. _____
3. _____

b. **Requesting an appointment.** What do you say in order to get an appointment with the Agent? The way you request may determine your ability to get the appointment you want! You should: 1) Share the why, 2) State the time needed, and 3) Stress the importance of an on-the-books appointment. You may say something like:

“Mary, I would like to schedule a 15-20 minute meeting with John (Principal Agent).

The leadership of our company has decided to change our role during losses. We want to be an Agency Brand Ambassador for your business with your customers.

The questions I’ve been asking on my previous visits tell me that your Agency is one we would like to Partner with. I would like to meet with John to confirm my thinking and discuss how we can best be an Agency Brand Ambassador when we are on a loss for your customers.

What openings does John have this week? Are mornings or afternoons better?”

What do you find most helpful in the script above?

c. ***Meeting with the Principal Agent.*** Congratulations on getting the appointment! Now you need to prepare what to discuss with your potential Strategic Partner. This discussion will confirm if they are an agent you want to represent. The discussion will also make very clear to the agent your new role and how you will work for their Agency specifically. For this meeting, you will want to cover the following:

1. ***Explain your new role***
2. ***Invite the agent to partnership***
3. ***Learn all you can***
4. ***Prepare to get the Agency team onboard.***

d. ***Explain your new role.*** An “Agency Brand Ambassador” is a new concept. No one has ever offered this service to Agents before. Because the concept is new, it is very important that a clear depiction is given for the agent. Start your meeting by viewing the Agency Brand Ambassador video together. You may facilitate this part of the meeting by saying:

“I have learned how to be the on-site extension of your Agency serving as your Brand Ambassador when on losses with your customers.

Let me show you what this looks like in action. (Watch video)

What about the idea of having an Agency Brand Ambassador excites you?”

e. **Invite the Agent to partnership.** Good job painting your role as Agency Brand Ambassador to this potential Strategic Partner! Now is the time to invite them to the official Partnership. You do this by asking three key questions:

1. *Would you like to become our company's Strategic Partner and have us represent you as your Agency Brand Ambassador?*
2. *I will become an active non-paid member of your team, working for you on every loss your customers have. Are you willing to put me to work?*
3. *For me to represent you the way you desire, we must put a plan together. Shall we do that today?*

f. **Learn all you can.** At this point in the meeting, the Agent should be highly interested in your new role as their Agency Brand Ambassador. Now it's time to learn all you can about how to be the best Agency Brand Ambassador for this agent and agency. Your sole function is to represent them the way they want to the best of your ability. Ask the following during the next part of your meeting:

1. *If I could only tell your customer's one thing from you when I see them on a loss, what would you have me tell them?*
2. *If I could leave your customers with a feeling from you, what feeling would you have me leave them with?*
3. *What are the top 3 most important things I can do for you when I am with your customer?*
4. *If I could be on the lookout for opportunities you may not be aware of when I am on the loss, what top 3 would you have me look for?*

5. *How would you like me to encourage your customer to refer their friends and family to you?*
6. *When would you like me to communicate with you?*
7. *How would you like me to communicate with you?*

What themes do you see in the questions above?

What excites you about the questions above?

Who are these questions all about?

What feeling will asking these questions produce in the Agent?

Which questions relate to protecting the agent's reputation?

Which questions relate to relaying information from customer to agent?

Which questions relate to identifying changes in the customer's life?

g. ***The Agency Brand Ambassador Good Faith Agreement.*** This is a tool provided at the end of this lesson on page 8 to use at every Strategic Partner acquisition meeting. Go ahead – look at it now! Record the Agent’s answers to your questions here during your meeting. When finished, read the agreement at the bottom aloud and sign your name. Take a picture of this document and save it with the Agent’s contact information in your phone. Leave the agreement with the Agent as a gesture of Good Faith and reminder of the new Strategic Partnership you have entered into.

In what ways can a document like this help you and your new Strategic Partner?

1. _____
2. _____
3. _____

Read aloud the italicized statement at the bottom of the Good Faith Agreement on page 8.

Who signs the Good Faith Agreement? _____

Who does not sign the Good Faith Agreement? _____

What do you think the reason is for this? How will this help your new relationship?

h. ***Prepare to get the Agency team onboard.*** Now that you and the Principal Agent are on the same page with your new role of Agency Brand Ambassador, it is time to get the rest of the Agency staff onboard. Our next lesson will tackle the details of how to do this. For now, all you have to do is request permission to return in a few weeks to host an agency Lunch and Learn (or Breakfast and Learn) to introduce the new relationship to the staff. Before you leave have the Principal Agent introduce you to the appointment booker and set the date and time for this event together.

What are your top take-away, aha, and light-bulb moments from this lesson?

- 1) _____
- 2) _____
- 3) _____

Agency Brand Ambassador Good Faith Agreement

Agency Brand Ambassador

(Agent Name)

Agency Reputation

1. If I could only tell your customer's one thing from you when I see them on a loss, what would you have me tell them?

2. If I could leave your customers with a feeling from you, what feeling would you have me leave them with?

3. What are the top 3 most important things I can do for you when I am with your customer?
 - a. _____
 - b. _____
 - c. _____

Agency Growth

1. If I could be on the lookout for opportunities you may not be aware of when I am on the loss, what top 3 would you have me look for?
 - a. _____
 - b. _____
 - c. _____
2. How would you like me to encourage your customer to refer their friends and family to you?

Agency Communication

1. When would you like me to communicate with you?

2. How would you like me to communicate with you?

I, _____, hereby commit to representing _____ (Agent Name)
to the best of my ability as their Brand Ambassador in the capacities listed above when on a
loss for their insured.

_____ (Signature) _____ (Date)