

Being the Agency Brand Ambassador

Enacting Your Role

Introduction: Now that you have a Strategic Partner, and the support of the Agency staff, you must deliver on your promise to be the best Agency Brand Ambassador you can be. You've already learned what the Agency wants you to do for them. This lesson explores how to execute your role as Agency Brand Ambassador.

What is the 1 ability you have as Agency Brand Ambassador that the Principal Agent and Agency staff does not have?

What are your 3 primary objectives as Agency Brand Ambassador?

1. _____
2. _____
3. _____

- a. **WHERE to execute.** In order to accomplish the 3 objectives above, you must be onsite with the customer during the loss. Your presence onsite is the reason for your existence as Agency Brand Ambassador. To convey your primary objectives, you must speak face to face with the customer. It is your responsibility to know when the team is working on a loss for a Strategic Partner. You must take ownership of this task!

How will you know when a loss comes in from a Strategic Partner?

What plan do you want to put together to ensure you always know when a loss comes in for a Strategic Partner? Complete the steps below:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

b. ***WHEN to execute.*** Take a moment to put yourself in the customer's shoes. This is most likely their first loss. Their home has been violated. The one place on earth they felt safest is no longer safe. Regardless of the extent of the damage, these feelings will be present and very real for the customer. Your goal as Agency Brand Ambassador is to be to the loss as soon as possible. You represent the Agent and Agency to a customer in crisis. You are there to alleviate as much pain and anxiety as you can. This requires urgent attention.

c. ***HOW to execute.*** There are 5 steps in successful execution of the Agency Brand Ambassador role. Let's take them one at a time.

d. **Step 1 – The Standard.** What is the best way you can represent the Agent and Agency the first time you see the customer? First impressions are the most important. In the midst of the customer’s chaos, your goal is to communicate care and confidence. This conversation is the Agency Brand Ambassador **standard**:

“You have a great Agent.

Your Agent cares about you and is sorry for your loss.

I will be seeing your Agent later today, is there any message you would like me to pass along?”

What does the word “standard” mean?

What does the Agency Brand Ambassador standard mean for you?

e. **Step 2 – The Good Faith Agreements.** Read the customer! If they are overwhelmed, take the message they gave you and leave. Come back at a later time to complete the rest of the customer conversations. If, however, the customer seems calm and able to talk, take the opportunity to talk with them about what your Strategic Partner and Agency requested in the Good Faith Agreements. It is your job to accomplish all that you can for your Strategic Partner. It is also your job to relay the information back – take notes!

What are some transitional phrases you could use to guide the customer to discuss items on the Good Faith Agreement documents?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

f. **Step 3 – Partner Reputation Protection.** Step 3 may or may not involve conversation. Remember that one of your primary objectives is to protect the Agent’s reputation. Who do you protect them from? Sometimes unfortunately it will be adjusters. Other times it may be friends and family of the customer. It could also be subcontractors, or even your own team members. Be on guard and look for moments to boost your Strategic Partner’s reputation as well as protect it.

g. **Step 4 – Communicate to Partner.** Now that you have enacted your role as Agency Brand Ambassador with the customer, it is time to complete your role with your Strategic Partner. You must now communicate back to the Agent what you did and learned from your time with the customer. Check the Good Faith Agreement documents for how the Agent and Agency staff prefers you to do this. It may be in person, it may be a phone call, it might be email. Whichever the preference, communicate within one hour of leaving the customer so the information is fresh in your mind.

- h. **Step 5 – Record Your Progress.** The final piece to complete for your role as Agency Brand Ambassador is to keep a running report of your assignments from your Strategic Partner. A template for your use is at the end of this document. This report will keep track of your victories for the Agency. It will also keep track of how many losses the Agency is getting you out on.

Take a moment and look at the tracking document.

How will this Report Card most help you as Agency Brand Ambassador?

- 1. _____
- 2. _____
- 3. _____

In what ways will this Report Card most help your Strategic Partner?

- 1. _____
- 2. _____
- 3. _____

- i. **The bottom line.** You are the Agency Brand Ambassador. You represent the Agent and Agency to the customer. When in doubt, ask yourself: *What would the Agent do/want in this situation?* Lead with your heart and be smart. Care, protect, and serve. You'll do great!

What are the 5 Steps to Agency Brand Ambassador Execution?

1. _____
2. _____
3. _____
4. _____
5. _____

Which step will be the most challenging for you and why?

Which step do you most look forward to completing and why?

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

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

Strategic Partner Report Card

A Tracking System

(Agency Name)
~ Strategic Partner Report Card ~
 (Agency Brand Ambassador Business)
 (Phone Number)

Customer Name	Loss Date	Brand Ambassador Site Visit Date(s)	Agency Brand Ambassador Notes: Reputation & Growth

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