

Maintaining the Relationship

Keeping It Alive

Introduction: You are well underway to being the best Agency Brand Ambassador you can be – way to go! There is one final tool for your toolbox. This lesson will explore ways to maintain the Strategic Partner relationship over time.

- a. ***The journey is not over yet.*** A reality you must remember: the claims cycle is unpredictable. You may have yet to get a loss from the Agency you are attempting to onboard. You may have gotten lucky and received a loss already during the onboarding process. Either way, great lengths of time will eventually pass between losses. You must help the Agent and Agency remember your role when losses are not occurring.

What are 3 things you can do to help the Agent and Agency remember your role when losses are not occurring?

1. _____

2. _____

3. _____

- b. ***A lesson from the garden.*** Plants take time to grow. So do relationships and habits. To produce the most stunning of flowers, the gardener begins by tilling the soil. Then he lays the fertilizer. Next he plants the seeds. Now he waits. But it is an active wait! During this time, he must water and ensure adequate sun exposure for the plants to grow. He also monitors for weeds or harmful microbial growth, correcting the affected areas as need. Be the gardener for your Strategic Partners. Give them your time and attention.

- c. ***Relationship maintenance at the basic level.*** Let's continue with the analogy above. The most basic level of maintenance is water. Water is absolutely vital to the germination of plants. In other words, without water the seed will never sprout.

- d. ***Some basic level ideas.*** Remember some of the Agency Onboarding information you gathered? Consider using your findings at this time.

In what ways could you use the information from the Agency Lunch and Learn?

- 1. _____
- 2. _____

In what ways could you use the information from the Individual Good Faith Agreements?

- 1. _____
- 2. _____

In what ways could you use the information from the Individual Team Building Activity?

1. _____
2. _____

- e. ***Relationship maintenance at an intermediate level.*** Staying with our garden analogy, sunlight is the intermediate level of care. The sun comes out for regular and predictable intervals each day. Visit your Strategic Partners and their Agency regularly. As you build your relationship with them, you will discover the frequency they need. Some Strategic Partners will need your presence every two weeks. Others may need your presence once a month. Still others may need your presence quarterly. If you are not sure, ask them! Sunlight enhances the growth of the plant, but too much can scorch it. Remember each Agent and Agency will be different. Find what works for them and stick to it.
- f. ***Some intermediate level ideas.*** It is important that each visit to your Strategic Partner has a purpose and is intentional. As their Ambassador, your job is to protect the Agency. That means their time, even with you. Resist the temptation to pop in just to say hello. Remember the Indicator Questions you asked when you first began to look for potential Partners? Consider using more of those. The answers will continue to reveal how you can better represent your Strategic Partner.

What additional questions can you think to ask that would enhance the relationship you are building?

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

g. Relationship maintenance at an advanced level. Pulling the weeds and treating any microbial growth is the advanced level of Strategic Partner care. What do the weeds look like in your new relationship? Weeds might be false perceptions or misunderstandings of your role as Agency Brand Ambassador. These “weeds” simply get in the way and compete for space in your garden. What does microbial growth look like in this relationship? Microbial growth could be any type of miscommunication regarding losses. These “microbes” directly attack the relationship and could eventually kill it.

h. Some advanced level ideas. The best treatments are preventative. When you protect your newly growing relationship by hedging against weeds and microbes, the relationship should produce all you hope. Consider the following preventative care options:

1. Review the Partnership
2. Celebrate successful Ambassador excursions
3. Solve challenges of the Ambassador

- i. **Review the Partnership.** Remind the Agent and Agency that you are their eyes, ears, and heart with their customer on a loss. Your three primary objectives are 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 their agent. Once your Strategic Partner is able to tell you this without your prompting, you may skip this step. You could say something like:

“I can’t wait for the next opportunity to be your eyes, ears, and heart with your customers during their water or fire loss.

I want to represent you on the job, letting the customer know how much you care.

Do you have any more questions about my role as your Agency Brand Ambassador?”

- j. **Getting new team members up to speed.** When there is any new Agency team member, be sure to utilize **Review the Partnership** step with them (point i above). Complete the Agency Onboarding Activities with the new team member on additional visits.
- k. **Celebrate successful Ambassador excursions.** Taking time to celebrate the wins will cheer anyone’s day! When you represent your Strategic Partner to the best of your ability in the way they asked, that’s a major victory. Use your Agency Brand Ambassador Report Card to review the customers you have seen, and how you best represented the Agency with that customer. You could say something like:

“Remember the Jones family, they had an upstairs water leak from their bathroom while on vacation. They came home to a flooded house.

I was able to let them know you are a great agent. That you care about them and were sorry about the loss.

I was able to help them think through some of their life changes that you should know about. They remodeled their kitchen. And they welcomed their first grandchild this year.

What did you like most about my role as your Brand Ambassador on this loss?”

1. ***Solve challenges of the Ambassador.*** Challenges are rarely fun to talk about. Yet solving challenges is absolutely necessary for the long-term survival of your new Strategic Partnership. Remember, as the gardener, solving challenges is routine maintenance. If you don't make a big deal out of it, neither will your Strategic Partner. The secret to success in this step is asking good questions, and actively listening to the response. That's right, don't talk back or get defensive. This is another opportunity for you to learn. You could say something like:

“Pete, I would like to ask you a very important question. What is one thing that I can focus on from now until our next visit to better represent you as your Brand Ambassador?”

Or

“Pete, I want to represent you to every one of your customers with a water or fire loss. What is one thing we (me and your Agency team) can do better to notify me of customer losses?”

Or

“Pete, I am an extension of you and your Agency. What is one thing we (me and you) can do to help your team embrace my role?”

What are the 3 Steps of Advanced Care?

1. _____
2. _____
3. _____

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

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

What are the 3 most helpful questions or phrases in the advanced level scripts (from review partnership, celebrate success, and solve challenges)?

1. _____
2. _____
3. _____

What caused you to choose those questions and/or phrases?

What are two reasons the advanced level of maintenance will never get old? In other words, why can this agenda be used at each follow-up agent visit?

1. _____
2. _____

m. **Continued value.** The best Agency Brand Ambassador is always on the lookout to improve. Remember from lesson one, you are playing an infinite game. To remain an active player requires you to learn new ways to grow and develop as Agency Brand Ambassador. What else can you do to bring value? In what ways can you better help the Agency? How could you better capture the customer conversations for your Strategic Partner? Who on the team (your company or the agency) needs further nurturing on your role as Agency Brand Ambassador? Keep asking questions. Keep learning! Then you really will stay the best Agency Brand Ambassador in the infinite game.

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

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