



**HOW TO BUILD  
EFFECTIVE  
RELATIONSHIPS  
WITH PROSPECTS**

 **Agent Pipeline, Inc.**

**#MARKETINGMONDAY**

**AGENTPIPELINE.COM**

# How to Build Effective Relationships with your Prospects



## #MarketingMonday

Returning customers play a huge role in your success. Loyal customers provide you with top of the line referrals, cross-selling opportunities, and generous renewals. How do you turn a new customer into a loyal customer?

When it comes to building loyal customers trust is everything. How do you earn trust? Think outside of the traditional sales and marketing strategy box. Identifying the needs of decision-makers is key, and it is likely different than what decision-makers required in the past.

The days of an “insurance sales hero” are over. Be a resource to answer technical questions and be of value to them. How can you make their life easier? Dig deep to create value.

Making connections with your customers is a big step towards finding a deeper understanding of what is needed for your service and products. However, this imperative insight will not be gained from a simple phone call.

The phone call conversations are becoming less popular with today’s technology (i.e., texting, social media, etc.) and families are more on the go than ever before. You have to earn your customers trust in other ways. The most successful relationships come from being able to identify with the customer and become an extension of their friends and family.

Insurance agents need to hang up the phone and connect in different ways. This includes extending your communication efforts to more in-person meetings by attending public events. When phone calls or emails are required to build customer relationships, it is important to bring more than a sales pitch to the conversation.

Phone calls and emails are still critical pieces of communication. However, they are no longer the strategy to “actually connect.” So why isn’t your sales pitch working? Simply put, your sales pitch is not working because it is a sales pitch! Ditch it now.

Getting to know your customer on a deeper level starts with building relationships. Go beyond making connections and bring value to the clients by demonstrating strength in numbers. Show teamwork. Work with your customers. Instead of presenting just a solution, ask them to work with you to identify an exact solution.

Work with your customers to create a unique value and develop a relationship more in the form of a partnership. Another way to build trust in a relationship is to ensure your clients feel equal, rather than less than. Customers do not want to feel less than the sales person, in fact, studies have indicated, individuals who feel less than or inadequate, 93% of the time will delay the sale or give the famous “We will need to think about It” objection.



With guidance from some of our top insurance agents who have ditched their sales pitch for relationship building, here are a few unique ideas to start your relationship building techniques:

### **Learn as much as you can about your prospects.**

Connect on LinkedIn, Facebook, and other social media avenues. Start thinking about ways you can add value to them, whether that be through referrals or something as simple as forwarding blog posts. Keep in regular contact with your customers by commenting on their posts and liking pictures.

### **Authenticity is key.**

You do not need a script to be yourself! When you are yourself and not working from a script, you are authentic. Keep your conversations casual and follow your gut. Even if you start talking about football scores of last night's episode of "Dancing with the Stars", it is still better than your script.

### **Tell a story.**

Engage your customers with stories. Sometimes you can throw in a sales message in content that captures your customer's attention, perhaps even tugs on their emotions but without a sales pitch! A story provides a structure that makes it easier to understand products, processes, or solutions you may be able to provide them. It is something they will remember when you are not in the room.

### **Think individuals, not numbers.**

Prospects are not homogenous. Every customer has their unique needs and preferences. It is important to remember even though each of your customers is a part of your targeted market and preferred segment, he or she are all different in many ways. While they may all have similar incomes, age ranges, or household size; they all have specific wants and needs. It is tempting to make a generalization based on demographics; the best client relationships are created when you have tailored strategies to the expressed needs of the individual customer.

### **Maintain open communication channels at all times.**

Healthy relationships thrive on communication. If you communicate only with customers at their request or when you need something, it will be difficult to leverage relationships as a driver of sales, referrals or new opportunities. Communication is a key ingredient in healthy client relationships. Satisfied customers are active participants who willingly offer the time and information it takes for you to achieve the best results.

"You don't close a sale; **you open a relationship** if you want to build a long-term, successful enterprise."

**PATRICIA FRIPP**

Relationship-building is not foolproof. Despite your best efforts, some prospects will choose to work with a competitor. However, when you drop your sales pitch and begin the implementation of relationship-building strategies, you will yield measurable improvements.

For more information on losing your sales pitch and creating a strategy focused on relationship building, contact your Regional Sales Director.

Our Sales Directors are equipped with the most efficient strategies and market knowledge in the industry to ensure your success with products, service, and a personalized value proposition.

We also incorporate unique tools designed to maximize your time and minimize your efforts with individualized growth plans, agency building tools, and no-cost lead programs.

Learn more today by calling 800-962-4693 and begin a partnership with Agent Pipeline.



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