



Client Retention

HOW TO ENHANCE YOUR CUSTOMER EXPERIENCE

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52% of organizations with customer experience programs in place have customer retention rates higher than 75%. Those are really great statistics but who really knows what a customer experience program is? It's just a fancy name for analyzing your current customers to learn what you can do now to retain more in the future. **A customer experience measures the customer's loyalty between purchase decisions.**

It probably seems like a waste of time and a lot of work. However, studies in the marketing industry have shown that when you have a "buyer legend" or "customer journey" in place; it's a fool-proof resource for an increase in new customers and customer retention.

Customer experience programs focus on four major components: **the source, what happened, what to do next, and delivers an outcome for you to incorporate in your business and marketing strategies.**

Who?

Start with customers who are 3-6 months from their renewal period. Ideally, you would want to find the key decision makers and make an appointment to visit with them. Discuss with them the intent behind your visit while on the phone.

It's important they know you aren't scheduling an appointment to sell them anything but to get their feedback on how you can perform better at your job. Letting your customers know that you value their opinion is very important. Your customers opinion of you is your brand, your key to referrals and the first key factor in your customer experience program.

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What?

When meeting with the key decision makers, it is suggested you have a pre-written small survey or script. Remember to give them options to assist with in-depth answers for your review. Remind them to list, circle or voice any and all that may apply. Many of your clients are afraid to hurt your feelings when given the option to complete their own answers; listing out multiple options for them to circle may be beneficial for you uncovering the truth behind their customer experience. It's also recommended to give them the "other" option to allow for additional answers.

Whether you are handing them the survey or doing a verbal interview, some of the important questions you should ask are:

- What benefits do you receive from my services?
- Security of complete coverage for your family
- Are there any benefits that I am not delivering to your standard?
- Insurance product line availability
- Customer service care
- Security of your insurance package
- Education on products
- Is there a likelihood of repeat business?



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- Would you continue to use my services if you were interested in adding additional insurance products?
- What would you recommend I do to earn a referral of a friend or family member?
- Are there any insurance products I do not offer that you would be interested in?
 - Final Expense
 - Mortgage Insurance
 - Hospital Indemnity
 - Accidental
 - Travel Insurance

Why?

Now that you have discussed an experience with a current customer; start examining those discussions. This is the beginning stages of your plan of action. Review all of the answers provided by your current customers.

- **What major reasons caused the customers to feel a certain way?**
 - **Did you not return phone calls in a timely fashion?**
 - **Were you unable to provide them with affordable dental, vision and hearing coverage?**
 - **Did they feel as though you did not educate them before they purchased the product?**



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- **Identify action items necessary to retain this customer.**
 - **Consider hiring an administrative assistant to answer the call coming into your office to ensure your customers are at least speaking to someone instead of an answering machine.**
 - **You may also consider hiring an answering service to assist on days you have scheduled appointments in the field.**
 - **Review all of the options available in your area with dental, vision and hearing plans. Reach out to your trusted contracting source and get appointed to add this to your product suite.**
 - **Education is important to your clients; consider bringing marketing materials to your next appointment and take time to review those items. Brochures, presentations, and flyers are all essential tangible objects to help with educating your clients. After your have presented each product, remember to ask them if they have any questions.**



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Now What?

Create your plan of action! Address the factors driving bad and exceptional customer experiences. Benchmark your revenue retention and growth rates. To ensure that you are staying on course, set a reminder to check the status of those benchmarks on a monthly basis.

Consider restricting your business plan. Look for new opportunities with products, marketing, and growing your agency with adding staff for customer support. Based on the information you have received, it will be easier for you to decide what area to focus on and what to allow for in your budget.

You can easily track your progress with spreadsheets or within your CRM and run reports regularly. Another idea is when you have closed your sale and enrolled your customers, ask them to complete a survey to determine if they were looking for additional products, rate their experience and immediately ask for the referrals.

With an immediate closing sale survey, you have the ability to track their experiences in real time. By doing this you are getting an even better tracking option for your benchmarks and growth rates.

Knowledge is power and by having an understanding of your customers' experience, you're giving them an opportunity to tell you exactly what you need to do to retain them. By the continued value of trust and loyalty, getting referrals will never be easier.



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