

Proven Ways to Wow Your Clients Post Enrollment Season and Beyond



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What We're Covering

Let's Discuss...

- ▶ What does it mean to “wow” a customer?
- ▶ What does a “wow” enrollment season look like?
- ▶ 7 ways to work towards a “wow” experience year-round
- ▶ Is your agency equipped?
- ▶ Questions

What's "Wow"?

It Depends...

What's "Wow"? It Depends...

There are three basic outcomes for customer experience:

- **Good service** is when the experience **meets** expectations.
- **Poor service** is when the experience **falls short of** expectations.
- **Great service (Wow!)** is when the experience **exceeds** expectations.

However, it's the customer who ultimately decides if the experience is good, poor, or great. The big challenge is that individual customers have different expectations. So, a "wow" for one customer might be no big deal for another.

ToisterSolutions.com

What's Always True: You Have to Understand Your Customer

Gather and record client feedback:

- ▶ Regular surveys
- ▶ Scanning social media profiles (your agency's and competitors!)
- ▶ Incorporate a client feedback link within emails or on your website
- ★ Keep all of this data in mass to analyze, AND keep it on individual client profiles in your AMS to refer to

Recording Client Preferences/Feedback

Macie Able (no group or carrier) 

Individual Detail Policies Opps Activities **Notes/Attachments** Relationships Workflows Emails

Personal Info

First Name *	Middle Name	
<input type="text" value="Macie"/>	<input type="text"/>	
Title	DOB	Age
<input type="text"/>	<input type="text" value="5/14/2007"/>	<input type="text" value="16"/>
Driver's License #	Deceased Date	
<input type="text" value="458DD3148"/>	<input type="text" value="mm/dd/yyyy"/>	

Client Info

Type	Status	Medicare Beneficiary ID (MBI)	Medicare Effective Date (Part A)
<input type="text" value="Client"/>	<input type="text" value="Not Interested"/>	<input type="text"/>	<input type="text" value="7/1/2005"/>

 **PINNED NOTE** 

Communication Preferences 6/6/23

Macie prefers LESS communication - she is fine with just the regular policy and renewal info. She wishes to not receive newsletters, check-ins, etc.

Recording Client Preferences/Feedback

Sarah Able (no group or carrier) 

Individual Detail Policies Opps Activities ¹ Notes/Attachments Relationships Workflows Emails

Personal Info

First Name *	Middle Name	Last Name *	Nickname
<input type="text" value="Sarah"/>	<input type="text"/>	<input type="text" value="Able"/>	<input type="text"/>
Title	DOB	Age	
<input type="text"/>	<input type="text" value="8/19/1974"/>	<input type="text" value="48"/>	
Driver's License #	Deceased Date		
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Client Info

Type	Status	Medicare Beneficiary ID (MBI)	Medicare Effective Date (Part A)
<input type="text" value="Client"/>	<input type="text" value="Enrolled"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>

 **PINNED NOTE** 

Communication Preferences 6/6/23

Sarah prefers to receive ALL communications, newsletter included.

The “Wow” Factor

FIRST: What's it look like during OE/AEP?

- ✓ Timely communication leading up to renewal season and/or timely follow-ups/prospecting for new leads
- ✓ Meaningful conversations and meetings
- ✓ Great selection of products and services
- ✓ Transparent communication throughout the process
- ✓ Follow-up “thank you” message or gift
- ✓ Timely feedback request a few weeks post-renewal season

What makes clients say “Wow!” ?

1. Be reliable and consistent, but still find ways to surprise them
2. Showcase your agency’s mission and values
3. Always respond ASAP
4. Maintain regular communication
5. Express gratitude
6. Tout your expertise & experience
7. Personalize their experience

1. Be Reliable & Consistent, But Surprise Them Every Once in Awhile

- ▶ “The Art of Consistency”:
 - Shows your clients are priority
 - Provides stability
 - Decreases anxiety
 - For YOU: improves self-control & mastery
- ▶ Consistency might look like:
 - Regular communication
 - Having agendas for each meeting w/ expectations
 - Answering their emails or calls in the same amount of time each time

ThriveGlobal.com



1. Be Reliable & Consistent, But Surprise Them Every Once in Awhile

▶ **Surprise them!**

- They're used to your monthly newsletters, but change up the content with new delightful messaging
- They're used to you answering emails within 24 hours; change it up and answer them within minutes when you can!
- They're used to having your office's coffee for meetings; surprise them by asking what their order is at the coffee shop and getting that next time



2. Live Out Your Agency's Mission and Values

Your agency's brand starts with YOU and the way you live out your mission and values. Consumers today expect to get a feel for WHY we do what we do beyond making money.

Your agency's mission & values should:

- ▶ Be felt through your communication (internally & externally)
- ▶ Be seen on your client & marketing materials where appropriate



2. Live Out Your Agency's Mission and Values

Our mission is to provide powerful solutions by making the convoluted, straightforward.

We want our technology to transform the organizations that use it.

1. We solve problems for our customers
2. We give ourselves the autonomy to be awesome
3. We will be human
4. We are maniacal about success



3. Respond Quickly No Matter What

Always respond ASAP, even if you're just responding to say you got their message—you're providing reassurance.

Tools that can help:

- Automated workflows
- AMS-tracked Activities
- Teams in an AMS



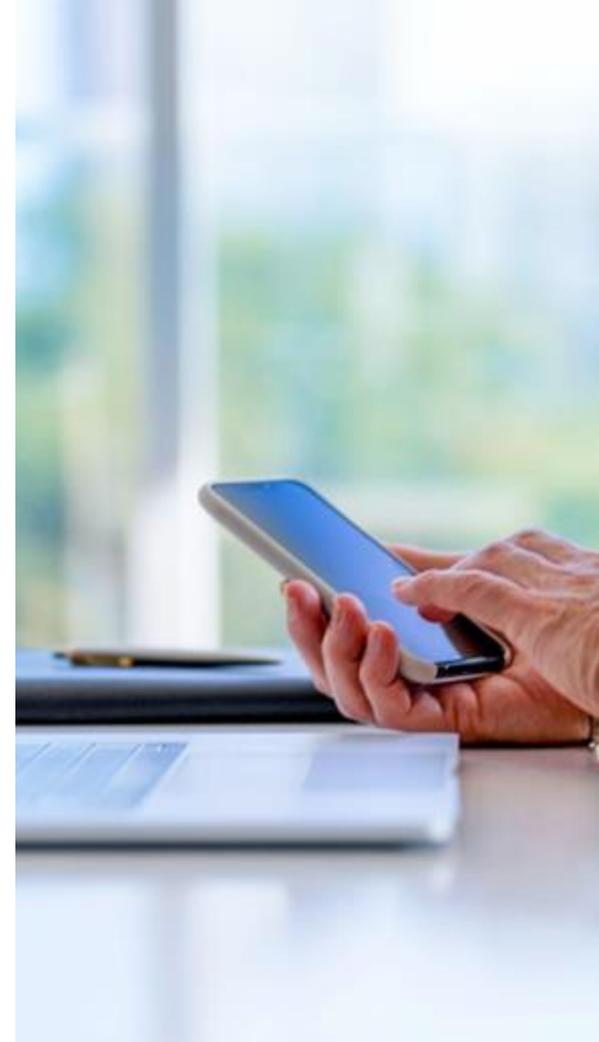
4. Maintain Regular Communication

After one negative experience, **61% of people will switch to a competitor**—make it two, and that number jumps to 76%. Good customer service is characterized by clear, effective, and timely communication.

Main takeaway: **Poor communication is a big contributor to customer churn.**

Tools that can help:

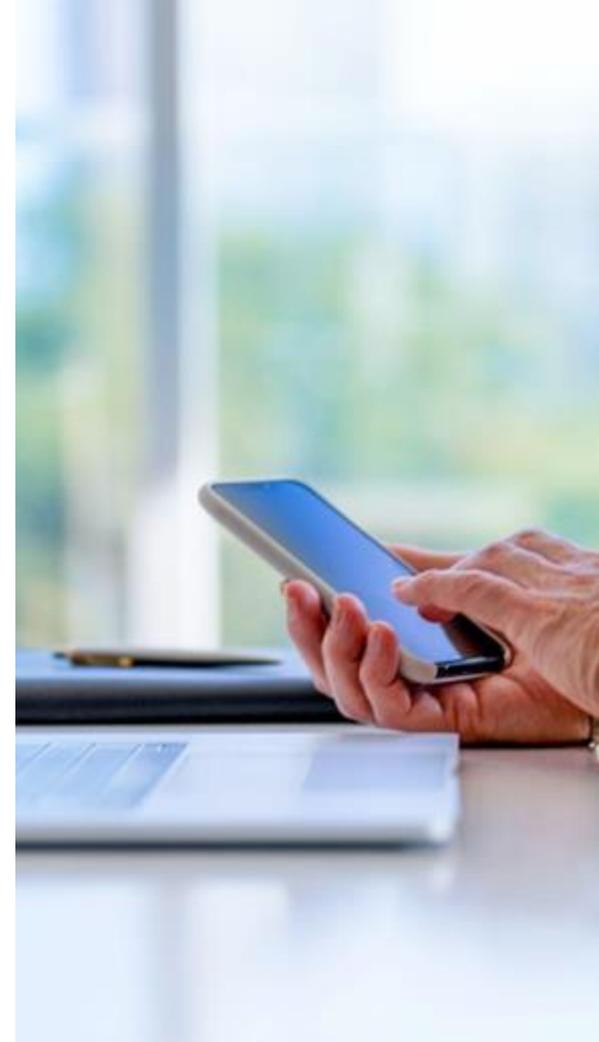
- Automated Workflows
- Reporting & Advanced Searches
- Email Campaigns



4. Maintain Regular Communication

Opportunities to communicate:

- ▶ Client onboarding
- ▶ Birthdays, anniversaries, other important dates
- ▶ Age-related products or services
- ▶ Renewal communication
- ▶ NPS (Net Promoter Score) or CSAT (Customer Satisfaction Score)
- ▶ Cross-selling



5. Express Gratitude

Studies have shown that feeling unappreciated is a big contributor to clients leaving a company.

Express gratitude in your everyday communications, but also find ways to sprinkle in surprise “thank you” letters or gifts.

Opportunities:

- Handwritten letters after becoming a client and/or on anniversaries
- Annual branded “thank you” gifts/baskets
- When you receive a referral from them

BusinessWire.com



6. Tout Your Expertise & Experience

Continue learning and sharing your expertise:

- CEs are important but so are the extra educational opportunities you take advantage of to level up above the rest
- Don't be shy: humbly tout the expertise you have and how you use it to give your clients the best experience

Doing so helps build trust and lets your clients know you're actively seeking out opportunities to better yourself and their experience.



7. Personalize Their Experience

We have *highly* personalized experiences online today thanks to algorithms. How can you create your own client algorithm to serve them with a personalized experience?

- ▶ Opportunities:
 - Client segments with different experience strategies
 - Video voicemails/emails - tailored to individuals
 - Addressing them by name (in person and within automated emails using variable data)
 - Client loyalty & referral programs



Is Your Agency Equipped?

Automated Workflows



Automated Workflows

1

When This Trigger ...

Workflow Name *

Trigger Type *

Trigger when ... *

2

Then Take Action ...

New Action

Show 25 entries

Subject	Action	Recipient	Timing From Trigger	Action Status
Welcome to ABC Agency!	Send An Email	Individual	1 Day(s) after	Active

Industry-Specific CRM

Chris Thomas ABC Bank & Trust Regular Full-Time (Active)

Individual Detail Policies Opps **Activities** Notes/Attachments Relationships Workflows Emails

Associated Activities

Create New

Search: Show 25 entries

Subject & Note	Association	Due Date	Priority	Status	Follow-up User	Follow-up Team	Last Updated
service issue (2) add add'l notes on this issue	Thomas, Chris	9/26/2022	MEDIUM	In Progress	Suzy Smith		Suzy Smith 10/5/22
Claim (1)	Thomas, Chris Ameritrust -not set-Short Ter...	8/31/2022	MEDIUM	In Progress	Suzy Smith	Case Management Team	Suzy Smith 8/29/22
New Hire Add (3)	Thomas, Chris		URGENT	Complete			Suzy Smith 3/22/22
Life review (3)	Thomas, Chris Mutual of Omaha-23422344...		MEDIUM	Complete			Suzy Smith 2/1/22

Showing 1 to 4 of 4 entries

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We Learned...

- ▶ Each client's "wow" is different
- ▶ There are 7 ways to work towards "wow" with your clients
- ▶ You will need industry-specific tools to help you achieve all of these things

Audience question: When was a time you were truly "wow"-ed by a company?

Questions?

Learn More About AgencyBloc



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