

# 29 Ways to Improve Completion Rate of Self-Service Inspections

**To get the best engagement you have to remove friction, add value, make it fun, incentivize, educate and connect**

## **1. Use SMS Invitations**

SMS works better than email. Make sure TCPA compliant

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## **2. Use Web App vs. Native App**

Either is good but no download needed for web app

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## **3. Keep It Short As You Can**

You can't ask 200 questions. Consider attention span of 15 minutes

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## **4. Send A Warm Up Doc with Invite**

A branded PDF can help engage the client

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## **5. Share the report once complete**

Return a copy of the report back to client

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## **6. Give a discount or credit**

A gift card or discount can be a great engagement tool

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## **7. Provided Guided Option**

Not truly self-service, but a real person can guide client thru the process

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## **8. Customize the app/report to type of business**

Make it personal, don't use a cookie cutter BOP report

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## **9. Provide follow up via PDF's**

Look for triggers...dogs, pools, woodstove and send helpful info

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## **10. Add in EDU vs purely LC focus**

Build in education info. Don't just take info from them

## **11. Connect beyond New or Renewal**

Inspections are a great way to connect. Looking for relevant conversations?

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## **12. Make sure there is customer support available**

Live support is needed if someone gets stuck

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## **13. Monitor progress and proactively check in**

If progress on the app stops, reach out, the fix is usually easy (and appreciated)

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## **14. Have omni channel option to connect**

SMS, email, chat. Meet the client where they are

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## **15. Gamify**

Inspections can be fun. How fast completed, how many pics, “best” pic of your dog!

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## **16. Provide value-add like HazardHub after completion**

Insurtech data providers like HazardHub have reports that are fun for client

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## **18. Invite at POS**

The earlier the inspection gets done, the higher the engagement

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## **19. Inspections as Lead Generator?**

Yes! Get the convo started. Provide 15-minute Risk Consult with the self-service inspection

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## **20. Use it on specialty products**

Specialty markets. Specialty inspections. Food truck? Craft beer?

## **21. Incorporate into Onboarding Call**

When your CSR or agent calls, have them get the inspection started

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## **22. Personalize**

Customize your inspection apps so they reflect your unique clientele

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## **23. Save time for your clients**

Small business owners appreciate being able to avoid an inspection and DIY it

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## **24. Keep short time frames**

Be upfront that you need the inspection back in 7 days or less

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## **25. Carrot & Stick**

You can always say, if you don't do the inspection, we will send out an inspector

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## **26. Inventory**

Help them get their inventory done while they do the inspection

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## **27. Use a video message**

Create a 60 second video to accompany the invite

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## **28. Use reminders**

Build in reminders to the process automatically

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## **29. Build in selling opportunities**

Inspection can lead to more business and gets agents more engaged



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