

TIP SHEET

9 Ways to Increase Customer Referral Traffic

Deliver a Differentiated Client Experience to Grow Your Insurance Business



The insurance industry is becoming increasingly saturated.

In 2018, the U.S. had 825,200 insurance agencies and brokers, [up from 653,300 in 2009](#). According to a recent study, [36,000 of those are independent agents](#).

You're competing for business not just with your independent counterparts but also the big guns who can afford Super Bowl commercial slots. That makes word-of-mouth referrals from customers essential to your growth.

How do you offer the kind of exceptional client experience that inspires people to tell their friends and family about you? Here are nine ways you can deliver differentiated customer service that sets your insurance business apart.

Make Engagement Easy

Friction has no place in our modern, digital-first world – so eliminate it from your client relationships to improve their experience.



1 Offer Virtual Meetings

The COVID-19 pandemic accelerated the decline of in-person meetings as the only meaningful engagement method. Give clients the option to connect using video conferencing tools like Zoom instead of expecting them to travel to your office.



2 Provide a Client Portal

Today's customer wants access and control. Provide both with a client portal that empowers them to stay on top of their insurance policies, easily make changes and connect with you if they have questions.



3 Be Active on Social Media

Staying top of mind for your clients means showing up where they are. Providing educational content on social media is a great way to strengthen your relationships, and it allows clients to share your information with friends.

Proactively Reach Out

In insurance, reputation is critical. Prove to your clients you have their best interests at heart by staying in touch about important matters.



4 Renewals or Better Rates

Your clients probably aren't thinking much about insurance outside of meetings with you, so let them know when it's time for a policy renewal or they may be eligible for a better rate.



5 Birthdays and Anniversaries

A quick happy birthday email or anniversary message can go a long way toward showing how you genuinely care about your clients.



6 General Check-Ins

Every so often – and especially when major disruptions like the pandemic occur – check in with clients, both to see if they have any concerns about their policies and to make sure they're doing OK.

Provide Value-Added Services

Clients today expect comprehensive (even concierge) service from their providers. Meet these increased demands head-on by augmenting your suite of solutions.



7 Offer Everything Under One Roof

Providing a bundle of available policies, including home, auto, renter's, business and life insurance, helps solidify your value while making it easy for clients to keep everything organized.



8 Refer Clients to Trusted Experts

You *can't* do your clients' taxes or create a financial plan for them, but if you build a network of experts who can, you offer value beyond insurance by referring them to other trusted professionals.



9 Consider Legacy Planning

Finally, talk with your clients about legacy planning. Helping them digitally organize and secure their assets, and making sure they'll be passed to loved ones when the time is right, is a powerful way to differentiate your business.



Delivering an exceptional client experience – including helping them plan for the future with a digital legacy planning solution – strengthens your current relationships and makes it easier to drive new business through referral traffic.

PLAYBOOK:

Engaging Clients and Attracting Prospects With LegacyArmour

Learn how to leverage innovative legacy planning technology to improve client relationships and close new business.

[Get My Playbook](#)

LEGACYARMOUR

222 South 9th Street, Suite 1600
Minneapolis, MN 55402
United States

LegacyArmour B.V.
Prinses Margrietplantsoen 33
2595 AM Den Haag
The Netherlands

1(844) UR-LEGACY
(844-875-3422)
info@legacyarmour.com

legacyarmour.com

