

Information and planning steps you can use to make the most of...

Your Touch Point Advantage

HOW DO YOU IDENTIFY YOURSELF?

Based on our customer research, you may want to evaluate ways in which you identify yourself to your customers.

Start with the following five considerations:

1. Are you identified as an

organization or is your identity more about the people in your agency?

Ideally, from the customer's perspective, it should be both. You are an organization of people. In other words, while you

have the strength, stability and staying power of an organization, your added value comes from the people in your agency – people that customers can relate to. That person-to-person connection is most always made during the initial sale and then through service calls as they occur. But is it communicated in other ways you identify yourself?

- Agency website
- Media advertising

- Agency newsletter
- Social media
- Direct mail and e-mail communication & marketing
- Regular correspondence with customers
- As renewals and endorsements are issued

DO CURRENT
CUSTOMERS AND
PROSPECTS
REALLY KNOW
WHO YOU ARE
AND WHAT YOU
DO?

2. Do current customers and prospects really know who you are and what you do?

This includes both the agency as a whole and individual staff members as well.

Consider:

- The products you make available
- Your experience and qualifications
- Areas of expertise
- Your focus on the individual and meeting their needs
- Personalized service
- Your involvement in the community

These tools are being made available for your use by PIA and The Partnership.

The Partnership



PIA recognizes and appreciates the participation and support of the following Partnership companies:

Central Insurance
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MetLife Auto & Home
Motorists Insurance
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3. Do you proactively communicate that your focus is on them?

- Getting to know them
- Understanding their needs and concerns
- Value in coverage and cost
- Tailoring coverage to their needs.
- Simplifying the process
- Being available and accessible

4. Are you clear and concise in your messages?

Express how you add value and be brief. Communicate what you have to offer and why they should do business with you. In other words tell them what's in it for them.

Avoid technical jargon as much as possible. Sometimes it's necessary, but ask yourself this: "Am I using an insurance term because I need to or am I using it simply because it's easier for me – at the expense of easier understanding for my customer?"

Don't distract with gimmicks or sales slogans that are too cute or too creative. Be memorable, but get to the point. Your messages need to be clear and concise.

Simple messages represent who you are and can even speak on your behalf whether or not you're actually present.

5. Your appearance. What do you look like? People relate to

and remember the way you look visually.

Your appearance needs to be uncluttered, professional, attractive and appealing.

- This includes:
 - Your office
 - Your media advertising
 - Business cards
 - Letterhead and other correspondence
 - Client presentations
 - Your website and social media presence
 - E-mail signatures and e-mail marketing