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# MARKETING TIPS FOR AUTOMATING PERSONALIZED RELATIONSHIPS WITH YOUR INSURANCE CLIENTS

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Insurance agents are involved in a very personal business. **Learn how to build** personal relationships while automating some interactions.

Insurance companies are in a very personal business. And yet they are also in a business with small profit margins making it challenging to invest time in building relationships. Thankfully, modern marketing has brought about many tools for automating customer interactions for better relationships.

Your business relies on trust. Customers trust that you'll advise them on the best insurance options based on their needs. And they trust that the companies you recommend will be there when the worst happens to them.

As you look for **ways to save time** while building more meaningful relationships with customers, **here are some communication activities you should be automating.**

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# 1 Automatically Segment Your Audience Based on Interests

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When you use a marketing automation system, you'll have the capability to segment the audience based on the content they view or the location of the contact form they used.

This makes it easier to assign the contact to the appropriate agent. For example, you might have an agent who specializes in life insurance, one that works within business insurance and a few others who handle personal insurance, like auto and home.

Now you have the information you need to get the inquiry to the right person without much back and forth or delay. This will help you secure the sale in more cases.

# 2 Capture and Nurture Leads

The first step in automating your marketing relationships is to ensure you're capturing and nurturing leads. No matter whether you're a solo operation or a large staff of many insurance agents overseeing accounts for thousands of clients, you should have a website. And on that website, you need to have forms and ways of getting in touch.

Commonly, forms on insurance websites help capture some initial information for preparing an insurance quote. Depending on the types of insurance you provide, your form might include questions about the prospect's home and vehicles. This will help you prepare a quote for them.

But what happens after you deliver that quote? You have all the prospect's important information, you should do something with it.

Entering them into a lead nurture series is wise as they contemplate their options. More than likely, the prospect has requested many quotes and quoted direct insurance companies like Geico where they can purchase their insurance entirely online without dealing with an agent.

But they don't know the benefits of reviewing their unique needs with a live human being who can walk them through common insurance scenarios and possible needs. So how can you communicate all that to the prospect and ensure they use your agency for their needs?

Emails and text messages can help you communicate these market differentiators. Consider the most important aspects of using an insurance agent instead of purchasing insurance transactionally. Then build out a series of messages based on that.

You'll be amazed at what happens with your leads when you have targeted, timely and thorough lead nurturing.

# 3 Acknowledge Milestones (and Remind Clients to Reevaluate Insurance Needs)

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As you look for opportunities to connect with customers about more than their insurance renewals, consider acknowledging milestones, such as birthdays, anniversaries or move-in dates.

It might sound silly on the surface to send a birthday message to someone whose insurance you help oversee, but it's a small personal touch that can make a big difference.

Knowing the client's birthday is important for quoting all kinds of insurance. So it's not an awkward question to ask or strange that you would know their birthday. The same is true when a client moves into their new home because you updated their insurance information.

And during these milestone emails, it's an ideal time to remind clients about some times to reconsider their insurance needs. Some important life milestones to consider include:

- Welcoming a baby (the client might want to adjust or add life insurance)
- Completing a home upgrade
- Getting married and combining insurance policies
- Retiring
- Adding new valuables
- Purchasing a new toy, like a boat or 4-wheeler

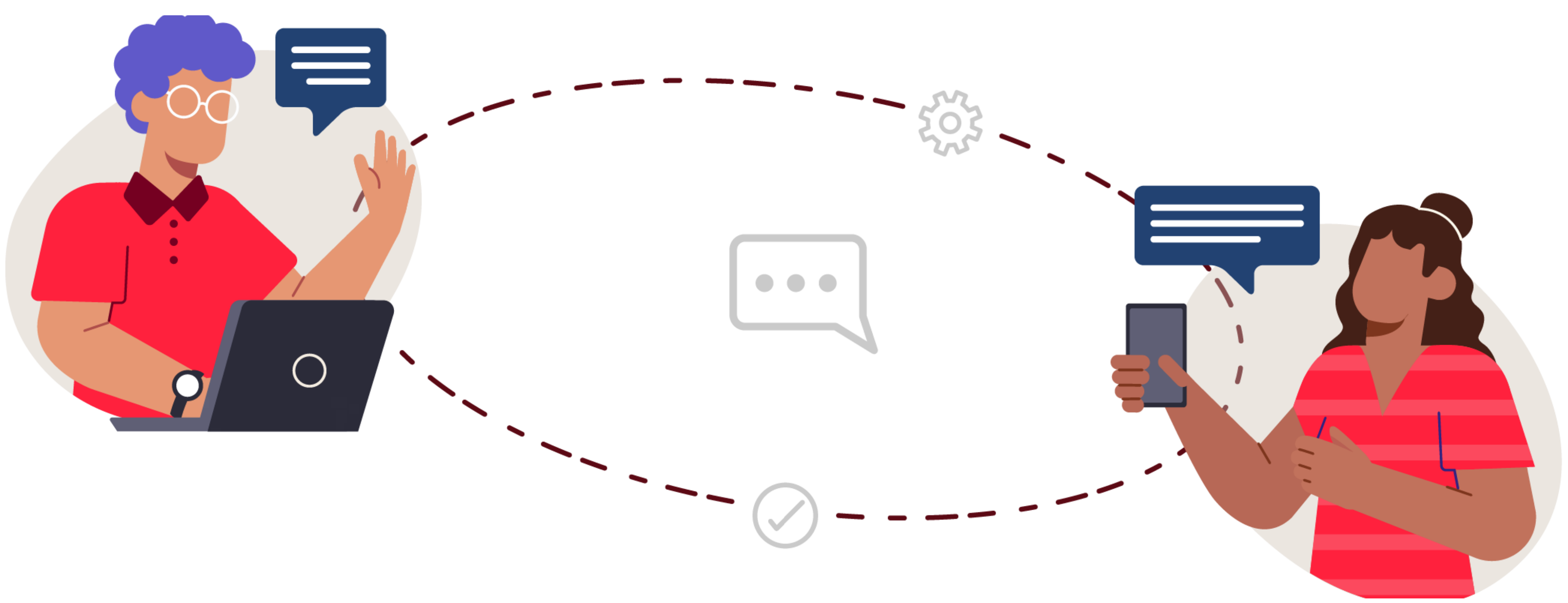
So while it's fun to help the client mark these occasions, it's also valuable to add some important details to these messages to add value to the message for both you and the customer.

You can send the message in both text message and email or allow the customer to select the best communication method for them and send it just to that channel.

# 4 Allow Clients to Text You

Clients are used to texting their friends and acquaintances. To set up their haircut or even dental cleaning, they might be accustomed to sending a quick text and getting timely responses. They expect the same experience when seeking insurance coverage or asking a quick question about how a change might impact their coverage.

There are plenty of services that allow you to send and receive text messages using computer software instead of your personal cell phone. Understandably, you might not want these messages coming through after hours when you're enjoying some rest and relaxation. And thanks to modern advancements, you don't have to worry about that.



Using a central text messaging platform can also help you share the load with other staff members. That way they can funnel the messages to the appropriate party without owning the burden yourself.

So while the client uses their phone to send messages, your team is using a system that feels more like instant messaging or email than texting. Opening this communication chan-nel can help make your interactions feel more personal to the customer.

# 5 Collect Customer Feedback

After interacting with a customer, you can automate the process of requesting feedback on the support they received. This can help you review how well each of your staff members is doing caring for your clients and their needs.

You don't know what you need to fix or improve until your customers share this information with you. Keep these follow-up surveys simple with just a few questions so it doesn't feel like a nuisance to your customers.

And during these messages, you can also suggest that a customer leave a review for you on Google or another third-party website. That way you're building your online reputation while also collecting valuable information about your customers' interactions with you.

# 6 Social Media

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Automating some of your social media postings can help remove some of the daily burdens of interacting there. You can schedule and automate regular postings to free up time to in-teract on social media instead.

You can schedule content directly on some platforms while others require that you use a third-party service to access this service. There are many affordable social scheduling and listening tools available on the market to help this process.

# Insurance Company Marketing Support

If you're an insurance company or agency seeking marketing support, New Light Digital can help you build meaningful relationships with customers while attracting prospects.

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