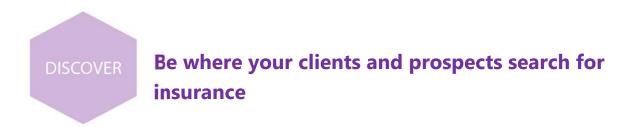
CHECKLIST:

Cultivate the Customer Experience Your Clients Want



What do customers want from their independent insurance agents? The Agents Council for Technology (ACT) has developed strategies to help you tap into technology and motivate your team to provide the service today's insurance consumers want. By creating a process with touchpoints throughout the insurance policy lifecycle, your team will build relationships and your clients will become champions of your agency and help you grow your business.



Create a robust mobile-friendly website Uebsite

☐ Testimonials and reviews

- Mobile-friendlyEasy to navigate
- ☐ Digital review from Trusted Choice

Content strategy

	About us page	
	Hours of operation	
	Agency location	
	Staff listing: photos, direct email and phone numbers, areas of expertise	
	Community service affiliations	
	Trusted Choice® logo and pledge of performance	
	Blog or FAQ area to address common questions	
	Articles on specializations	
	Staff contributed content	
	Guest content	
	Content from Trusted Choice	

Check back for fresh ideas often: Independentagent.com/ACTCX

Include content specialization/location Use keywords Complete "Find an Agent" profiles with carriers and Trusted Choice Build a social media presence Create complete profiles Follow and engage business clients Share new or relevant website content Share posts of staff/community engagement Look to Trusted Choice for consumer content Host a video series Promote posts and advertise in social—it's affordable



Create a digital presence reflective of your services and brand

Showcase your expertise

Showcase your quality		
	Utilize Trusted Choice content, staff and testimonials	
	Promote it in social media	
	Post timely content on the website	
	Set-up a blog or easy content posting tool on your website	

_ _ ...

Build your online rankingAsk for social media reviewsCreate a response system

Offer comparative rating

Choose a management system and rating solution and include it on your website



Online application with minimal client data entry points

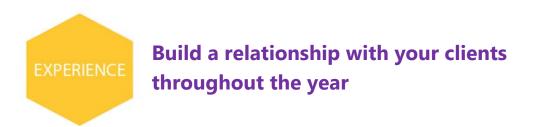
- ☐ Find the data curation resources that works for your agency
- ☐ Find the co-browsing website that works for your agency

E-Signature

☐ Implement an e-signature service

Bonus service feature: online chat assistance

☐ Add a chat feature to your website



Mobile account management and communication preferences

- ☐ Choose an account management tool
- ☐ Implement account management tool online
- ☐ Consider using text message alerts
- ☐ Track customer communication preferences

Be proactive when life changes

- ☐ Implement a plan to nurture clients
- ☐ Recognize life changes like birthdays, anniversaries, when there's a new licensed driver, etc.

Value added, community building services

- ☐ Let clients know of current community activities
- ☐ Host shred events or safe driving courses
- ☐ Highlight advocacy and community commitment in all communication channels

Check back for fresh ideas often: Independentagent.com/ACTCX



Assess clients' needs and modify service accordingly

Be p	roactive with renewals
	Update customer profiles Provide a proposal with comparable quotes, rate increase explanations
Create	a positive claims experience
	Provide clear process and after-hours options for reporting claims Brief client throughout the process Follow-up upon resolution Act on behalf of the client should an issue arise And if denied, help them understand why and work through the experience
R	Ask for online reviews and referrals
Review	s s
	Make reviews and ratings easy for clients Include an ask for review or rating when it makes sense Thank clients that leave reviews/ratings Respond swiftly to all reviews/ratings
Video [·]	Testimonials
	Use your smart phone, DSLR or other equipment to record video testimonials Post them on the web and social
Blog p	osts and written testimonials
	Ask clients with audience that reaches your target to mention your services or their experience

with your agency in a blog post