HawkSoft User Group

EMBRACING TECHNOLOGY TOGETHER

BUILDING A CLIENT ENGAGEMENT STRATEGY

Part 3- Finalize A Winning Strategy
Monitor, Adapt & Enhance

Introduction of Presenter

KARAMARIE MORTON

Marketing & Organizational Development

Today’s Agenda

- Client Engagement- Refresher of Part 1 & 2
- Monitor, Analyze & Adapt
- Internal Training & Development
- Questions

CLIENT ENGAGEMENT

What is Client Engagement?

IT IS ABOUT RETAINING &
MAXIMIZING THE VALUE OF YOUR CLIENTS!

GOALS, BUILD & CREATION IS NEXT!

Example: Rules of When to Engage

- When there is a need to clearly articulate expectation on how you will be working with them, what they will need to do to work with you, and what their Carrier requires.
- When there is a consistent misunderstanding of a product, service or process.
- When there is a new product that meets a clients need. (Segmentation)
- When there is an issue or alert about a policy.
- When you need to honor your role as an Advisor to the client. i.e. children in the home that will soon be driving, renewal reviews, etc.

CLEAR. CONSISTANT. HELPFUL.

RESEARCH, ANALYZE, SEGMENT, DEFINE, BUILD, CREATE…

1. Identify 1 (One) Segmentation and 2 (Two) Client Engagement Programs Needed

- **Research** | Sit down and think about all the ways in which you communicate with this segment of active clients, prospects, leads and referral sources.
- **Analyze** | Study customer activity and preferences by analyzing the habits of your current customers in this segment, frequent issues and common areas of confusion that always arise. Think FAQ!
- **Develop Rules** | What are key factors to consider on where you/they engage.
- **Create & Innovate** | Create the workflow of what you/they need to communicate (each touch point) and what each elements needs to state and how you want to deliver it.

2. Create a List of All Assistance & Technology Assets Available to Your Agency

2. Build Out Outline, Create Content

SIMPLE FORMULA

DEFINE MEASUREMENT

You need to know if WHAT you are doing is working.

WHAT Measurement Are You Focusing On?	HOW & WHERE Are You Going To Monitor Them?
CSR Service Activities Related to UW Repairs Required	HawkSoft Activities Report- Communication Logs
Home Claims- Roof & Windows Due to Ice & Snow	HawkSoft- Advanced Reporting- All Year
Home Claims- Due to Ice & Snow Denied	HawkSoft- Advanced Reporting- All Year
New Client/ New Policy HOME- Retention 1st, 2nd & 3rd Year with NPS (90), Client Survey (9.5), Sentimentality-Promotor	HawkSoft, CRM, Reputation Management Tool (RMT)
Referrals from Segment	HawkSoft Source, CRM, Reputation Management Tool (RMT)

BUILD OUT

Work Through Your Outline & Build Out the Strategy into Identified Systems

- Build out into all platforms required.
- Set Up all Feedback Mechanisms. Are you meeting your Objectives? Do you have Measurements working?
- Run Your Own Test.
- Present to Broker have them Test.
- Together Make a list of errors, unexpected occurrences, things to consider, functions that team members need to learn, etc.
- Present Broker Test Example Team.

HOW TO FRAME YOUR MINDSET

Clients Can Be Discontent…Use That as Your Opportunity and Know Human Nature is Diverse To Prepare You For What is Next!

> *One thing I love about customers is that they are divinely discontent. Their expectations are never static—they go up. It's human nature.*
>
> **JEFF BEZOS**
>
> in his 2018 letter to shareholders[29]

INTERNAL CHANGES/TRAINING

Nothing works seamlessly…and not everyone buys in.

- **Communication & Change Management**
  - Clearly communicate the need for the changes/program and promote regular feedback. USE DATA!
  - Emphasize the benefits and positive impacts of the new strategies, but be open to what you may have missed are did not give as much weight to.
  - Connect client engagement strategies to the core values and mission of the organization. Implement a change management plan to address resistance and ensure a smooth transition.
- **Training Needs Assessment**
  - Identify the skills and knowledge gaps in your team that need to be addressed through training. USE CAUTION IN STATEMENTS!
  - Conduct a training needs assessment to understand what skills are required for the new client engagement strategies.
- **Develop Training Programs**
  - Training should cover both technical skills (e.g., using new software or tools) and soft skills (e.g., communication, relationship-building).
- **Customize Training Roles**
  - Tailor training programs based on the roles and responsibilities within your organization. Sales teams may require different training than customer support teams.

INTERNAL CHANGES/TRAINING

Nothing works seamlessly…and not everyone buys in.

- **Provide Ongoing Support**
  - Establish a support system for employees as they implement the new strategies. This may include ongoing training sessions, resources, and check ins.
- **Vocally Celebrate Successes!**
  - Recognize and celebrate achievements and successes resulting from the implementation of the new client engagement strategies. This helps boost morale and reinforces positive behaviors.

IF IT ALL GOES WRONG!

A Well Managed Response Can Turn a NEGATIVE Into An OPPORTUNITY!

- **Communicate Transparently**
  - Be transparent with clients about the challenges and issues. Acknowledge any shortcomings in the strategy.
  - Clearly communicate your commitment to resolving the issues and improving the client experience
- **Create a Plan of Actions**
  - Form a response team with representatives from relevant departments (sales, customer service, marketing, etc.) to collaboratively address the issues.
- **Communicate Changes Internally**
  - Internally communicate the changes and improvements to ensure that all team members are aligned with the new approach.
  - Reinforce the importance of a client-centric mindset across the organization.
- **Reassess and Adjust the Strategy**
  - Reassess the overall client engagement strategy. Determine whether adjustments or a complete overhaul are necessary.
  - Incorporate lessons learned into the revised strategy to prevent similar issues in the future.

DEADLINES

Stop the Redundancy of Getting Ready, to Get Ready.

- Set a Clear Deadline. I used three weeks, but when I first started it was a 6 week process.

Work to Complete	With Other Duties (Limited Time)	Without Other Duties (Your Focus)
Research, Analyze, Identify Areas Of Need	Week 1	3 Days
Segment, Develop, Plot, Meet with Team	Week 2	3-5 Days Depending on Complexity
Create Content, Build Out, Review, Deploy	Week 3	2-4 Days Depending on Complexity

MONITOR & EVALUATE

Have you Set Up Your KPI's

- **Document What You Are Seeing- Inspect What You Expect**
  - Is the program running correctly?
  - Are you getting any feedback from clients or team members? Any changes required?
  - Are you documenting all your measurements in one spot?

- **Create a Cross-Functional Team:** Form a team with representatives from various departments (sales, marketing, customer service, etc.) to ensure a holistic approach.

ITERATE & IMPROVE

Embrace a mindset of continuous improvement.

- Based on feedback and performance data, continuously iterate and improve the client engagement strategies and associated training programs.
- Address challenges and setbacks with a focus on learning and improvement.
- Adapt your client engagement strategy to stay competitive and meet or exceed industry standards.

BE PREPARED TO MAKE CHANGES/ENHANCEMENTS!

Remember that the success of any client engagement program depends on a combination of answering a need, effective training, clear communication, and ongoing evaluation and improvement.

WHAT YOU HAVE ACCOMPLISHED

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Your Homework Has Helped You! Be Proud of What You Have Accomplished!

- **Built An Engagement Stack-** Software that will help you create content, deliver messaging, test hypotheses, Review Analytics, assign attribution, perform automation, and more.
- **Uniquely Position Yourself In An Agency-** You are now a great advisory tool for the agency and can offer even more valuable insights to help propel your Agency forward.
- **Strengthened Your Agency Workplace Culture-** By integrating both internal and external practices, you have created and maintained a positive workplace culture that not only supports the development of effective client engagement strategies but also contributes to the overall success and well-being of your team.
- **Improved Your Agency Training-** Finding and addressing the miscommunications, creating easier work paths, possibly automating some basic processes, and showing "How To" is a win for any agency!
- **Became A Stronger Advocate For Customers**

List of Tools

Additional Tools Mentioned Today

- **Trainual:** Tool to assist with Onboarding Team Members, Training, Policy & Procedure Management, and Education Update Documentation
- **Tremendous:** Customer Referral Rewards Program- Both Simple & Complex
- **Traliant:** Workplace Training for Positive & Safe Work Cultures

QUESTIONS

Today’s Presenter(s) – Contact Information

Feel Free to Reach Out to Me/Us

KARAMARIE MORTON
Marketing & Organizational Development
Eastern Insuring Agency
Email: kara.Morton@easterninsuring.com
Phone: 800.698.1222 ext 302