CSE CHECKLIST – "BRING REAL MEANING TO CUSTOMER SERVICE"

WHAT TO DO

☐	Review your client list and delineate them by type, i.e. new, established, at-risk.
☐	Create a contact calendar—when and how will you reach out to each client. Quarterly in-person updates, monthly status reports, weekly email checks—whatever best suits your client needs.
☐	Identify key agency benefits that should be communicated and reinforced with your client.
☐	Be sure to highlight the advantages of working with an independent agent.
☐	When new products or services are introduced, review their benefits with clients.
☐	Position yourself as a resource.
☐	Adjust the overall client care approach as needed based on client concerns. You don't want to under-communicate—but nor should you over-communicate.

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