

CSE CHECKLIST – “UNDERSTAND YOUR MARKETPLACE”

	<p>Expand your market. Technology makes it possible and imperative that you look beyond your immediate geographic market.</p>
	<p>Leverage technology. Use it to gain operational and communication efficiencies. The time freed up can be used on client retention and new sales.</p> <ul style="list-style-type: none"> <input type="checkbox"/> If you still have a paper-driven office, you’re well overdue on this checklist item. <input type="checkbox"/> Be sure you have adequate backup and emergency plans in place to secure electronic documentation.
	<p>Personalize your approach. This service advantage versus carriers remains an agent trump card. While you should be leveraging technology, don’t let it replace face-to-face contact altogether.</p> <ul style="list-style-type: none"> ○ Note that you can even translate this personal approach to your online communication. Even e-mail should feel personal and not like mass mailings. Carriers don’t have the same ability to pull this off, so use this to your advantage, i.e., include personal notes if appropriate: <i>“Saw in today’s paper that your son had the winning touchdown. Looking forward to hearing about his season at our next meeting. Until then, here are the policy details you requested...”</i>
	<p>Specialize. Focus on a few industries and sell yourself as an expert. When you become the go-to resource, it is more difficult to be replaced. Generalists seldom get ahead anymore.</p>
	<p>Partner with carriers. Work with, not against carriers. They are typically eager to help develop sales tools, marketing presentations, research and information. It becomes a win-win for carrier and agent.</p>
	<p>Expand communication: Be available where your customer is looking, when they are looking (translation: get online!)</p>

