

Insurance Agents: Building Your Referral Network

As you grow your insurance business, the power of a strong referral network will save you time — and will help you serve more people.

Referral Networking Tips



BUILD LOYAL FANS

Every prospect and existing client is your opportunity to build a trusting relationship that can turn customers into fans. A customer is happy with your business. A fan posts a great review on the web and tells their friends and family about you.



DELIGHT YOUR CUSTOMER BASE

Creating delight takes a little effort, but it is worth it. Follow up with new clients to make sure their questions are answered and they know how to reach you. Always deliver on your promises, and always be consistent in your service.



ASK YOUR HAPPY CLIENTS FOR REFERRAL CONTACTS

Once you have some happy clients, make sure they know that it's your pleasure to be of service — *and you would love to help others in the same way*. Ask your clients for the name and contact info of anyone they can refer to you, and THANK THEM for those referrals.



MAKE IT EASY FOR CLIENTS TO TELL FRIENDS ABOUT YOU

The simplest way to start with referral marketing is to encourage clients to tell their friends and family about you. But you can make this easier by having business cards, short flyers or branded giveaways like pens or magnets available all the time, ready to hand out so they can share.



ALWAYS, ALWAYS EXCELLENT SERVICE

No matter what, serve your clients well. Happy clients are the goal, no matter how many referrals they might send or what their total lifetime value is to your business. Start from this principle and you'll do great.

Note: Always Stay Compliant!

As a licensed insurance agent, make sure that any marketing communication you do is in alignment with all regulations that apply to the products you sell and the state you reside in. Failure to stay compliant can result in the loss of your license and steep fines. Medicare agents must also follow the CMS Medicare Marketing Guidelines.