



AFFINITY NETWORKING FOR AGENTS

Guide to Affinity Partners: **Professional Services**

Use this guide as you get started building affinity partnerships with professional services businesses. These include, and are not limited to:

✓ Retirement Communities

✓ Group Health Agents

✓ Retirement/Financial Planners

✓ Life Coaches or Therapists

✓ Property and Casualty Agents

✓ Tax Preparers

✓ Law Firms

✓ Real Estate Agents

Before You Meet — Researching Your Partners

Your goal is to build affinity partnerships with select professional services companies in your area that will benefit everyone — including the clients!

Professional services businesses may be interested in:

- New client referrals
- Services to their clientele without competing on products or services already provided by your partner
- Help with marketing initiatives or co-promoting each other's businesses
- Events you can host together as a service to their clients

Be Compliant!

Your interactions with affinity partners and their clients must always adhere to CMS and carrier rules and guidelines. Check with your carriers, CMS and your compliance officer before you start marketing.

Starting the Relationship — Making Yourself Known

Here are some ideas on starting your discussions with potential affinity partners:

- Choose a few businesses based on their client base and complementary offerings to your insurance services. You can start with businesses you already know, or use online search engines for specific business types near you. Pick a day to make in-person visits.
- If you'd like, bring a small gift or a branded item to leave with them.
- When you arrive, ask to speak with the owner and introduce yourself as a local agent seeking a business networking partnership.
- Bring your pitch deck — customized for this business — and be ready to pitch if they have time now. If they can't, schedule a time in the coming days to talk.
- Be real, be friendly. When they can tell that you care about their audience and the local community, they'll be more open to listening!



What Professional Services Businesses Care About

As you talk with your potential affinity partner, really listen for any stuck points they have with clients or growth and notice what's important to them. Here are examples you might hear, and how your partnership might help:

- Not enough time for growing their reach: Your clients may turn into new prospects for them
- Worry about not offering enough services that clients want: You can offer additional health or financial products that meet client needs
- Client retention and satisfaction: With more of their clients' service needs met, retention could increase

Building the Relationship: Ways to Remain Top of Mind

Once started, it's important to nurture your affinity partnerships. Here are just a few options about when and why to reach out:

- Plan events with your partners, and keep communication flowing, increasing in frequency as the event approaches
- Drop off promotional materials monthly or quarterly and ask for theirs in return
- Check in monthly as a touch-base to manage progress and make long-term marketing plans

Be a Great Affinity Partner — You've Got This!

As you build affinity partnerships, remember that you're doing great work. You are offering more of what your clients need while supporting your partner's clients with additional insurance options.