



**STRENGTHENING &
DEVELOPING LONG TERM
RELATIONSHIPS
WITH YOUR CLIENTS**

IMPORTANCE OF STRENGTHENED RELATIONSHIPS WITH CLIENTS

- Clients are arguably one of the most important factors of starting and sustaining a successful portfolio.
- Without clients - especially those who return to hire you again and again your business/portfolio would be non-existent.
- This is why the more successful you are at understanding and forming relationships with your clients, the more successful you will be at growing your sales.

HOW TO DEVELOP GREAT RELATIONSHIPS WITH CLIENTS?

1. Get to Know Your Clients

- Even if you think you have a good understanding of where your clients are coming from and what they need from you, you may be surprised at the many ways you can get to know them better.
- Consider letting your conversations get a little personal by sharing what you do during your off-hours, information about your family, etc. It doesn't have to be intrusive, but sharing non-work information occasionally can strengthen your clients relationships.

2. Do Exceptional Work

- It's obvious that when building relationships that the quality of the work you do should be exemplary.
- If you're not making your clients happy, it will be virtually impossible to forge long lasting relationships.
- Aim to exceed their expectations whenever possible, and demonstrate how you can become a valued extension of your clients' businesses.

HOW TO DEVELOP GREAT RELATIONSHIPS WITH CLIENTS?

3. Communicate With Your Clients Regularly

- Consistent and effective communication is important in all relationships, particularly relationships with your clients.
- You can create the habit of practicing good communication by being responsive to client calls and emails, scheduling regular check-ins, sharing company news, and interacting with your clients across social media, if appropriate.
- In general, remaining in regular contact and keeping your clients in the loop can go a long way.

4. Ask for Feedback

- It's important to ask for client feedback after individual projects or when reaching milestones in long-term projects.
- You can take a formal approach by using a client satisfaction survey, or ask them informally during a conversation.
- The most important step of getting client feedback, however, is having a plan for addressing any concerns or criticisms and being committed to improving your business processes.

HOW TO DEVELOP GREAT RELATIONSHIPS WITH CLIENTS?

5. Rely on Your Expertise

- Many times, your clients will welcome and appreciate suggestions on how to do things better or more effectively.
- Use your past experience and in-depth knowledge of the work you do in your business to help your clients develop solutions that surpass their initial expectations.
- This can be accomplished by comprehensive consulting, or even more informally, such as by sharing tips, advice and resources that will help your clients in their own businesses.

6. Cultivate Partnerships

- By considering each client relationship as an ongoing partnership, you can move the relationship to a collaborative, mutually beneficial partnership.
- This focus can make you more successful at building a sustainable relationship instead of simply doing the work and moving on. And you never know where you might find a opportunity to create a joint venture and work together in a whole new way.
- These tips will help you solidify your client relationships and create a strong foundation that will help you grow your business to new levels.

HOW TO DEVELOP LONG TERM RELATIONSHIPS WITH CLIENTS?

1. Set Realistic Expectations:

- While making promises it is always better to under promise than to over promise.
- When you under-promise there is a possibility to over-deliver and this can improve your image in the eyes of your customer.
- The customer starts feeling that he is important to you and takes a step forward to build a relationship with you.

2. You need to connect with your customers:

- Even if it does not pertain to your job, it is good to help your customers by asking questions and giving suggestions.
- Always make it a point to ask your customer, what you can do for him/her.

3. It is important to document things and keep them handy:

- For example, you could keep track of your customer's birthday or anniversary and send him/her a card or a note.
- It pays to remember his/her kids' names too. It is important to do a little extra if you want to thrive in the business of insurance.

HOW TO DEVELOP LONG TERM RELATIONSHIPS WITH CLIENTS?

- 4. Prompt response is of utmost importance in the business of insurance:**
 - Delayed responses or failing to respond may make your customer feel neglected or unimportant. He/she may even stop contacting you.
 - Once your customer places a call to your call center, it is very important to reply to his/her call at the earliest.
 - Quick and fast responses to the inquiries of customers can take you a long way in CRM.

- 5. Think less like an insurance agent and more like a salesperson during customer engagement:**
 - This will help you in being persistent.
 - You will be surprised to see how you will be able to convert so many 'NOs' into 'Yeses.'