



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

# IMPORTANCE OF STRENGTHENED RELATIONSHIPS WITH CLIENTS

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- 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?

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## 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.

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## 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.

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## 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.

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## 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.'