AgencyBloc

Agent Retention-Focused Email Templates + Workflow Recipes

In these templates...

Your insurance organization's agents and employees are its most valuable asset. And just like selling to prospects and clients, it is much more cost-effective to retain your agents than to recruit and train new ones. One of the most significant tools you can use to make sure your agents feel supported is **communication**. With an insurance-specific agency management system with built-in automation capabilities, constantly communicating with your agents is easier than ever.

Throughout these templates, you'll see content styled [like this]. This is content you could automatically personalize with the right technology, like workflow automation tools in AgencyBloc's AMS+ solution. Additionally, in some templates, you will notice information styled [like this]. That indicates an area where you need to enter personalized information manually.

AMS+ has the tools you need to maintain communication and a good relationship with your agents. Using the built-in communication tools, you can send automatic retention-focused emails and task assignments to agents while seeing significant time savings.

New Agent Onboarding

Send this to welcome a new agent to your agency, GA, or IMO/FMO.

Email Template
To: Your New Agent
Subject: Welcome to [Business Name]!

Hi [First Name],

Welcome to [Business Name]! We are so happy you're a part of our team. To get you up and running as quickly as possible, here are the next steps you can expect:

[List of next onboarding steps/tasks and important links]

If you have any questions, please let me know!

Take care,
[Agent Name]
[Agent Schedule Link]
[Agent Direct Phone]
[Business Name]

How to use: Create a workflow that triggers when a new agent is created in your agency management system or CRM. Immediately after the agent is created, send an email to the agent to start the onboarding process. Take it a step further by creating a second action in the workflow plan: an email or task assignment to the agent to begin the next steps of the onboarding process.

Not sure what to include in your agent onboarding process? **Download this checklist** to set your agents up for success from the very beginning.

Happy Birthday

Send this communication to your agents to wish them a happy birthday.

Email Template
To: Your Agent
Subject: How are things coming along?

Hi [First Name],

Happy birthday from all of us at [Business Name]! We are so grateful for your hard work every day and hope you celebrate the day with friends and family!

Sincerely,
[Business Name]

How to use: A simple communication like a birthday wish to your agents and employees is an easy way to boost morale and let them know you're thinking of them on their special day.

Based on how your agents prefer this type of communication, set up an automated email or create a task for the sales manager to send a text message or card to wish them a happy birthday. Simply create a workflow in AMS+ to trigger when an agent's birthday is approaching.

Work Anniversary

Send this communication to your agents to congratulate them on their work anniversary with your agency, GA, or IMO/FMO.

Email Template
To: Your Agent
Subject: Congratulations on [number of years] years at [Business Name]!

Hi [First Name],

Congratulations on your work anniversary! We appreciate your hard work over the last [number of years] years here at [Business Name].

Sincerely,
[Business Name]

How to use: Work anniversaries are a great way to recognize your employees for their hard work and dedication to your business. Send them an email to observe this milestone and boost employee retention.

You can add an additional action to the workflow to notify leadership via task assignment or email so they can send a congratulations card.

License Expiration Date Approaching

Send this communication to your agent to remind them of their license expiration dates.

Email Template
To: Your Agent
Subject: Action Required: License Expiration Date Approaching

Hi [First Name],

This is a reminder that your license will expire in [number] days. Please remember to renew your license before it lapses. A task will also be assigned to you in AMS+ as a reminder to complete this.

If you have any questions, please let me know!

Sincerely,
[Business Name]

How to use: Set up this email to send automatically using Automated Workflow in AMS+. When you create the workflow, you can determine how far in advance and how many times you'd like to communicate (like 90, 60, 30, and 14 days out) based on your organization's needs. Automating this communication can lessen the chance of your agents' licenses lapsing.

After the agent has been notified of the approaching expiration date, use Automated Workflow to also assign a task to the agent to renew their license.

Agent Feedback

Send this communication to agents to gather feedback regarding your agency.

Email Template
To: Your Agent
Subject: We Want To Hear From You!

Hi [First Name],

Here at [Business Name], we take agent and employee feedback seriously to be the best [agency, GA, IMO/FMO, call center, organization, etc.] possible. That's why we'd like to hear from you! Reply to this email with any feedback, or click the link below to take the anonymous survey.

[Survey link]

Kind regards,
[Business Name]

How to use: Gathering agent feedback and ensuring your employees and agents are heard can be extremely important for agent retention. Knowing what's on their mind and receiving suggestions on areas where your organization can improve can make your agency, GA, or IMO/FMO the best it can be.

If you have created an employee survey and need a response by a specific deadline, add a second step to the workflow to create a task and assign it to your agents so they remember to fill it out in time.

Agent Recognition

Send this communication to an agent going above and beyond in their role or to recognize them for an accomplishment.

Email Template
To: Your Agent
Subject: Congratulations on a job well done!

Hi [First Name],

We want to take this opportunity to thank you for your hard work at [Business Name]. You've gone above and beyond in your role, and we want to recognize your dedication to our company.

[Details about why this person is receiving this recognition]

Keep up the great work!

Take care,
[Business Name]

How to use: Take a moment to recognize your agents who are exceeding expectations in their day-to-day work. An email outlining the specific ways they've excelled can reassure agents their work is making a difference and does not go unnoticed.

Market or Industry Information

Send this communication to your agents when new market or industry information becomes available.

Email Template
To: Your Agent
Subject: Industry news: [Topic]

Hi [First Name],

We all know how quickly and often the insurance industry is changing. That's why we want to keep you up-to-date and informed about what's happening in the [health, benefits, senior, etc.] world.

[List, paragraph, or details of the latest industry or market information]

Please reach out to [Business Phone Number] or [Business Email Address] if you have any questions.

Take care,
[Business Name]

How to use: The health, benefits, and senior insurance industry is constantly evolving. When new industry information or news becomes available, ensure your agents are up-to-date and are knowledgeable about the situation. This can also be a great time to inform them of any procedural changes that might occur should the industry news affect your processes.

Upcoming Continuing Education (CE) Opportunities

Send this communication to your agents to inform them of upcoming available CE opportunties.

Email Template
To: Your Agent
Subject: New Continuing Education Opportunities

Hi [First Name],

Have you completed your continuing education for the year? Here are some upcoming opportunities for you to take advantage of:

[List or details of upcoming CE opportunities for your agents]

Please reach out to [Business Phone Number] or [Business Email Address] if you have any questions about these opportunities or your CE credits.

Take care,
[Business Name]

How to use: All insurance agents are required to complete continuing education training each year. It's important to make sure your agents complete their requirements in the specified time frame. By sending out communications regularly about new opportunities for your agents to acquire CE credits, you can provide your agents and downlines with top-level customer service.

You can also set up an Automated Workflow in AMS+ to assign tasks to agents reminding them to complete their requirements regularly throughout the year at whatever intervals make the most sense in your state.

Learn More About AgencyBloc's Plus Suite of Industry Solutions

AgencyBloc is the **#1 Recommended** Insurance Industry Growth Platform serving the health, benefits, and senior insurance space. Our suite of insurance-specific solutions can help your independent insurance agency, GA, or IMO/FMO remain compliant and accelerate growth.

Learn more in this 5-minute overview video:
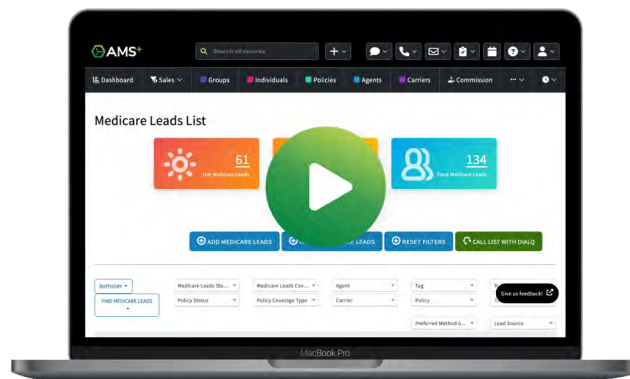
> "I recommend AgencyBloc to anybody who's running an agency and trying to keep track of agents, policyholders, and carriers. With AgencyBloc, you've got it all in one single place on the web, accessible 24 hours a day with backup. It's always been on for us. We've never skipped a beat."

Lynn S.
KHI Solutions

Ready to learn more about AgencyBloc?
[Schedule a live, one-on-one demo](#) of AgencyBloc's industry-specific platform. You can discuss your team's specific needs and see AgencyBloc in action.