For insurance agencies, retention is absolutely crucial to a healthy, growing, and prospering agency. To achieve a higher retention rate, consider implementing the three tools below. Integrating all three will help your agency stand out above the rest and improve your client's loyalty to you.

Workflow Automation

Email Marketing

Branded Cards

# Automated Workflow

*With automation, you're able to work smarter, not harder to achieve more in your day. Set up the Automated Workflow once, and it works independently to fulfill your needs whenever that workflow's criteria are met.*

To boost retention, these are 5 Automated Workflows you can set up right now. You can set up each workflow to match your specific business process, but the examples below show you all of the options you could choose to help you stay on top of your book of business.

- Policy Renewal
- Happy Birthday
- Turning 26
- Turning 65
- Policy Application Status

## Policy Renewal Workflow

Renewal Date Approaching → Email sent to agent

Renewal Date Approaching → Task created for agent

Renewal Date Approaching → Email sent to client

A policy renewal workflow is very beneficial to utilize as it keeps the communication channels open between you (the agent) and your client. Lack of meaningiful communication is one of the top reasons insurance clients leave an agency. Avoid this downfall and be proactive with your client communications.

## Happy Birthday Workflow

Client’s Birthdate Approaching → Email sent to client

Make your client’s birthday extra special by reaching out to say *Happy Birthday*. It’s a small gesture but one that’ll resonate with them. Plus, it’ll add another contact between you and your client to the mix to help them feel more connected to you.

## Turning 26/65 Workflow

Client’s Birthdate Approaching →
- Email sent to agent
- Task created for agent
- Email sent to client

The 26th and 65th birthdays are big ones that bring loads of insurance changes for your clients. Ensure they’re prepared and well-informed on how you can assist them during this transition. Getting in early can help you convert them quicker and ensure you get their business. You can set this same workflow up for both—just don’t forget to change the email copy!

## Policy Application Status Workflow

Client’s Policy Status Updated →
- Email sent to agent
- Task created for agent
- Email sent to client

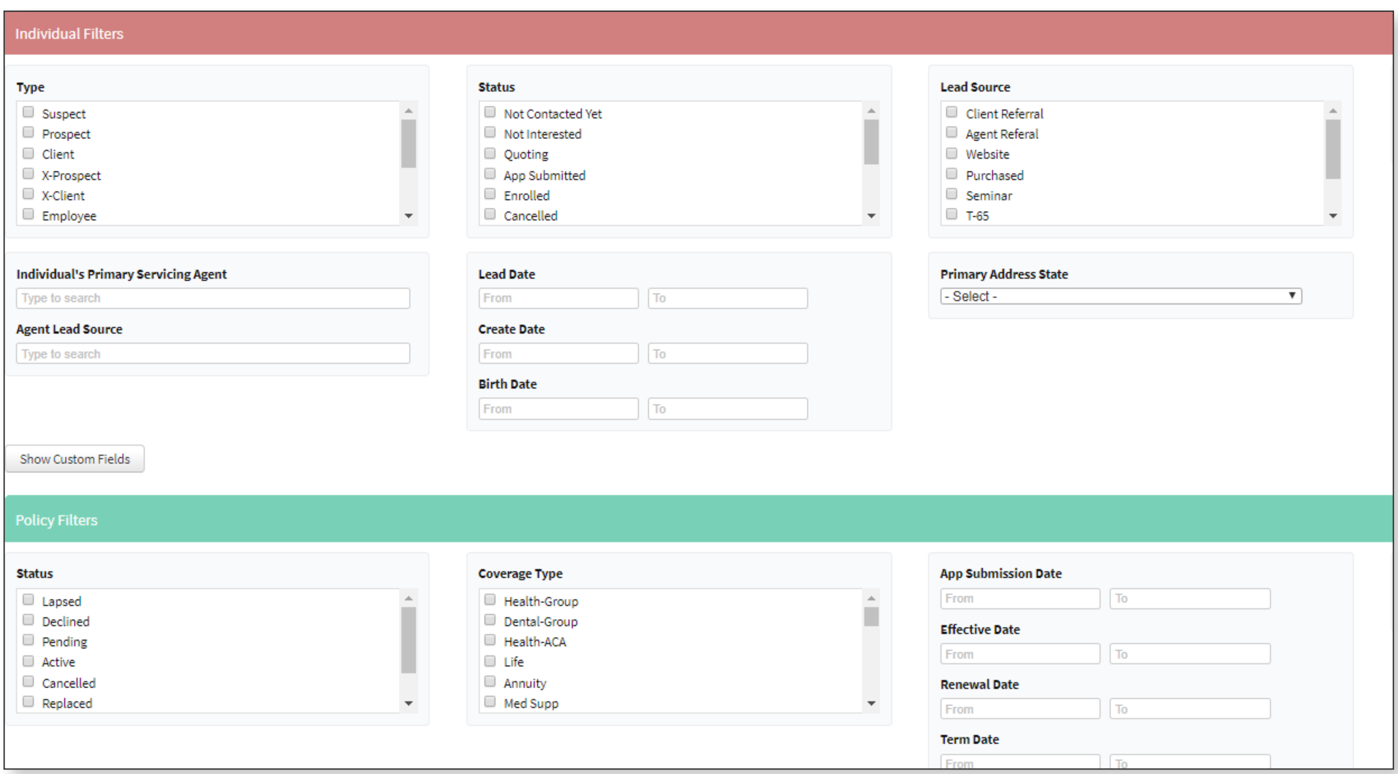
Keep new clients and existing clients well-informed of their policy application status with this workflow.

# Email Marketing

*It's beneficial to have an industry-specific agency management system (AMS) with built-in email marketing capabilities to keep everything in one place. With AgencyBloc, you can run robust searches directly in the email marketing feature to target only those clients that fit the criteria for the mass email send you have planned.*

Email marketing is a great tool to leverage for changes that affect many (or all) of your clients at the same time. Three major examples are:

- Upcoming dates for Open Enrollment (OE)
- Upcoming dates for Annual Election Period (AEP)
- Upcoming changes for certain plan types/carriers



As you can see on the screenshot above, the options on filtering out recipients are vast. You can identify down to minute specifications of who you want to receive what email.

Using this method, you can keep that stream of communication open for your clients to use at any time. They'll be grateful that you're taking the time to help them prepare and plan for coming events.

An email doesn't take long to set up, but the effects can be lasting, showing you care and want to educate them on things that will affect them.

### Pro Tip

Individualize your mass client emails but utilizing variable data.

Within AgencyBloc's Email Campaign builder, use variable data fields to automatically pull in information from your client record to the email. This data shows up in brackets [ ].

For example, if you use the variable data [First Name], their first name will be pulled from their record and inserted into the email.

This helps to personalize your emails and make them feel warmer. Plus, it'll resonate more with your clients and help them to feel more connected to you individually.

# Branded Cards

*Branded cards are a fantastic opportunity for you to recognize your clients and send them a warm congratulations. You can design your own cards on a variety of sites to match your brand.*

Branded cards present you with the option to send handwritten cards to help your clients celebrate different milestones in their lives. These can happen organically or you can run a report to identify the right clients.

When it comes up organically through conversation, you or the customer service rep/office assistant on the phone can create a task for the agent associated to that client or policy. This then shows up on the agent's dashboard alerting them that they need to send a card to help that client celebrate whatever milestone (like a personal anniversary, new pet, welcoming a baby, new house, master's or doctorate's degree, etc.) they've achieved.

A small gesture like this makes a big impact with your clients because you're taking the time to celebrate *them*.

An idea for a report is to send a Happy Anniversary letter to your clients on an annual basis. In AgencyBloc, you can build a custom report and save it to identify those of your clients who started their policy that particular month. Then, each month you can run that report and see which clients are celebrating an anniversary. After that, you can send them a personal card to say Thanks and that you appreciate their business.

You never know, a gesture like a handwritten card could prompt that client to recommend you to a friend or family member!