

Communications insurance agents should be sending



Welcome card

Mail this card to all new clients when they join your agency. Since handwritten notes in the mail are so rare these days, this extra touch shows you truly value your new clients' business and establishes a more personal relationship that further sets you apart from the competition.



Welcome email

Send a welcome email to your clients one to two business days after they join your agency. It's a great way to get the relationship started and make sure your clients know they can reach you via email when they need to.



Survey request

Knowing how your customers feel about you is critical to growing your agency. That's why you need a survey to measure client loyalty. We recommend sending a loyalty survey to your clients every six months. You'll find out which of your clients are happy, which ones are upset, and how to take proactive steps to increase overall client loyalty.



Testimonial and review request (email or text)

Once you discover which of your clients are happy with your service, you can ask them for a testimonial for your website or a review on Google or Facebook. Send these requests to your happy clients and they are likely to say positive things. This feedback will help others discover your agency and choose it over online competitors.



Detractor phone call

If a client responds to your survey negatively, call them within 48 hours to address the issue. Making this call, instead of letting the problem go unresolved, increases your chances of retaining the client at renewal by more than 50%.



Check-in email

Send two to four of these per year. Reach out outside of renewal times to see what may have changed in your clients' lives and offer to review their policies to make sure they have adequate coverage. Clients will appreciate you're watching out for them.



New client follow-up card

Mail this handwritten card anywhere between one and two months after a client joins your agency. It's a great way to continue the onboarding experience and open the door for further conversations and opportunities. Clients will appreciate knowing you didn't forget about them soon after you got their business.



Renewal communication

Send an email or call your clients as renewal approaches, in addition to sending them policy review information, and offer to set up a time to talk about any changes. If you're communicating consistently with your clients, they'll often just let the policy renew without getting hung up on price adjustments.



Useful stories and content

Give your clients something without asking for anything in return—like useful content and guidance. Do this by reaching out with interesting content regularly throughout the year, no strings attached. Share stories on topics that may be interesting to your clients—it doesn't always have to be related to insurance.



Birthday and holiday cards

This simple gesture makes a big impact on the relationship. Most clients will appreciate the fact that you made the effort to send them a personal card when all other businesses will likely send a generic email, if at all.



Referral thank you card

Mail this card to every client who refers someone to your agency. Clients who refer once will often refer again if they feel appreciated. If you'd like to, include a gift card, but always position it as a surprise thank you rather than a reward.



Purchase follow-up email

When a client adds a new policy, it's a good idea to reach out a month or two after to make sure they know you're there for them if they have any questions.



Loyalty card

Mail this card to your top clients. It could be clients who have been with your agency for a while, clients who have given you positive feedback on surveys and in reviews, or clients who have several policies with you. This will be a nice surprise your clients will appreciate and will likely tell friends and family about.



Cross-selling campaigns

Offer your clients additional coverage periodically throughout the year based on the information you have about them. Use targeted emails to introduce your clients to new, relevant products that complement their existing policies. You can use a mix of emails, text and cards for your cross-selling campaigns.



**Ready to automate all of
these communications?**

We can help!