

AGENCY TIPS & TALKING POINTS

What to say to get the conversation started!

PROSPECTING

The simplest way to introduce your technology is to use it as a selling point.

"Did you know that we have our own app? It's a one-stop shop for managing policies, accessing documents, and getting help from our agency."

APPLICATION PROCESS

If you know your prospect has policies with a connected carrier, make the quoting process easier by connecting their policies.

"Just so you know we have our own app, and we can use it to easily get you a quote. I'll send you an invite to get started, I'll add your carrier. Just log in through there and that'll give me everything I need to know about your policy to get you a quote!"

NEW CLIENT ONBOARDING

Once a new policy is issued, invite the client to GloveBox, add carriers, and show them the basics. Inform them that policy information will be available soon. You can even assist with creating login credentials.

"Your policy is issued, the last thing to do is connect you to our app, where you can manage policies and get help from our agency! I'll send you an invite and then I'll help you get set up! It will only take a minute."

NEW CLIENT FOLLOW-UP

Follow up with your policyholders around policy start date to make sure that they're set up with GloveBox.

"Your new policy has recently just gone into effect and I wanted to reach out to make sure you have everything you need! Going forward, you can easily manage your policies and get help with our app. Do you have a minute to get that set up?"

ONGOING SERVICE WITH EXISTING POLICYHOLDERS

Every service-related interaction is an opportunity to remind your clients about their options for self-service. Wrap up every call with a mention of GloveBox!

"I see that you have not yet signed up for our mobile app! I'm sending you an invite right now! That way, you will always have access to your policies and policy documents! Our app will also give you direct access to our agency to request quotes or service in the future!"

CLIENT RETENTION

Helping your clients understand how to use and how to access self-service tools gives policyholders a consistent positive agency experience, which is necessary to create enduring client relationships.

"With our agency, you have a ton of options for getting help. If you'd prefer not to call us or your carrier directly, you can use our mobile app. I can send you an invite and help with initial setup."