Your Clients Are Talking, Are You Listening? How Their Feedback Fuels Growth

By: Brendan Mulcahy

Client feedback is one of the most powerful tools an independent insurance agency can use to refine services, improve retention and drive growth. Client feedback can be tremendously valuable and a sign of loyalty to an agency. Yet, many agency owners struggle to implement a structured approach to effectively encourage, collect and utilize feedback.

This gap presents both a challenge and an opportunity. Those agency owners who can master encouraging, gathering and acting on client feedback can differentiate their agencies in an increasingly competitive market.

Collecting and Using Feedback – the Right Way

For independent agencies, every interaction — phone calls, emails, in-person meetings, etc. — presents an opportunity to gain feedback. Even a simple check-in after a client files a claim or before renewing a policy can reveal pain points, expectations and gauge satisfaction with an agency's service. But agents at smaller shops tend to wear many hats, which can make it difficult for them to find the time to prioritize client feedback.

Additionally, smaller agencies might lack the right tools or processes to collect, track and implement feedback. As a result, any concerns or even compliments regarding an agency's service can become lost insights.

A blend of structured processes and technology can assist agencies in capturing these insights.

Agency owners should leverage multiple mechanisms to collect feedback. It can be via phone, email, agency software such as an Agency Management System (AMS), Customer Relationship Management (CRM) system or some other method depending on your clients' preferences. There are even technology vendors whose products are dedicated to collecting and managing client feedback. Clients may also relay their experiences through online reviews and forums such as Google Reviews, Yelp and Reddit. Agency owners and team members should pay close attention to insights gathered from these sites.

Agency owners and team members should consider the timing when requesting feedback. Asking for feedback at key moments — like after a claim is resolved or a policy is updated — ensures clients share their thoughts when it is top of mind for them, and more importantly, feel heard and appreciated.

After receiving the feedback, agents and team members should respond quickly and authentically. If a client has a complaint, addressing it promptly can turn a negative experience into a positive one. If feedback is positive, it can be used to reinforce what's working well and encourage clients to refer family and friends. Either way, clients should know their input is valued.

In the end, it's critical that agents find a feedback system that works best for them.

Technology's Role in Streamlining Feedback Collection

Undoubtedly, technology is the backbone of modern business — and that extends to tools designed to assist with client feedback. CRMs are

powerful tools for managing customer relationships and communications, and there are technologies that agents can leverage specifically geared at collecting and managing client feedback. Such programs help streamline the feedback collection process, provide real-time insights and uncover patterns and trends that can drive smarter decision-making. But the right technology stack enhances client management by strengthening relationships and helping agency owners and team members stay ahead of consumer trends and behaviors.

In conjunction with an agency's AMS, CRMs allow agency owners and staff to document key pieces of information, such as client and prospect contact preferences, policy details, claims history and past conversations. In turn, these technologies provide a 10,000-foot view of client needs and expectations so the team can provide more proactive and personalized service. Automation features further streamline the process, making it easier to schedule follow-up calls or emails after key interactions. This helps ensure deeper insights into customer satisfaction and uncover trends in real-time so agency teams can sharpen their services and deliver a better client experience.

It's important to remember that the efficacy of any agency's technology stack depends on the quality and consistency of the data agency team members put into it. For technology to deliver meaningful results, client data must be stored in a structured, decentralized way that keeps information accurate, accessible and actionable for the entire team. Standardizing data entry processes, such as logging client interactions consistently, updating records in real-time and categorizing feedback correctly, helps to ensure an agency's technology operates at its full potential. Without disciplined data management, even the most advanced CRM, for example, will struggle to identify patterns needed to support smarter decision-making.

When treated as an evolving tool, an agency's technology stack becomes a powerful asset for long-term client satisfaction and business growth.

Getting the Right Support

Managing feedback effectively and efficiently requires a continuously evolving multipronged approach. Consider these best practices to achieve this:

- Invest in comprehensive training to ensure the agency's entire team knows what to listen for from clients, how to ask for feedback and understand how they can share that feedback and apply lessons from it to guide future interactions.

- Establish reliable systems and processes for the team to track and follow up on feedback via the agency's AMS and CRM and hold the team accountable. Create a process for ongoing evaluation to assist team members in spotting trends sooner, so they can stay agile in the face of shifting client expectations.

- Encourage and even incentivize the team to provide input and share learned best practices to help position the agency for sustainable growth and success.

Client feedback is a valuable asset that can help shape the future of an agency. But how agency owners and team members collect and use that feedback equally matters. Reviewing an agency's feedback processes can help identify areas for improvement, whether in data collection, timing or follow-through with clients. By actively listening and acting on client feedback, implementing structured processes and leveraging the right tools with the right training, agents can build stronger relationships with clients. ∎

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