SENIOR MARKETING
SPECIALISTS

The Experience Driven Agency

Presented By Chalen Jackson

Compliance Officer, Key Accounts Specialist

Senior Marketing Specialists

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Compliance Officer and Key Accounts Specialist

Senior Marketing Specialists

A Tale Of Two Clients

Charles and Lucie

Charles

- Charles Purchased a plan at T65
- He received a check in call two weeks later
- Quarterly newsletter
- Birthday card
- Invite to Client event
- Engaged on Social Media
- How long does Charles stay a client

Lucie

- Buys a plan during AEP
- Calls to check on ID cards in January, is told to be patient
- Gets a form letter in September reminding about AEP

The Best of Times, The Worst of Times

- Your clients are having an experience, like it or not!

- Inconsistency is the death of progress

- A choice to work with you cannot be a roll of the dice.

Great Expectations

Setting the Tone

- Opinion and impression begins before a client meets you

- Retention begins on first contact

- Set service expectations and live up to them

Don’t Start Today What You’ll Have to Put Off Tomorrow

You can do some amazing things when you have 50 clients

What can you still do with 500 clients? 1000?

Don’t let efficiency be the death of magic.

Sentiment

Do What Matters

What will really matter to you clients?

Find Ways to serve needs before they arise.

High-Impact Advising should be the focus

Is Your Difference Maker…Making a Difference?

Are you pitching the same level of service as your competition?

Find something unique to provide value to clients.

You need to establish an area of exceptionalism

Our Mutual Friend

Handling Referrals

- If you can be worthy of that trust, referrals are the gift that keeps on giving.

- Consistency is critical. No one should feel second rate in a referral situation.

Identifying Referral Opportunities

- Be Specific!

- Find ways to make it easy

- Upsell/ downsell the referral ask

Multiply Your Referrals

Stop asking… “Who do you know?”

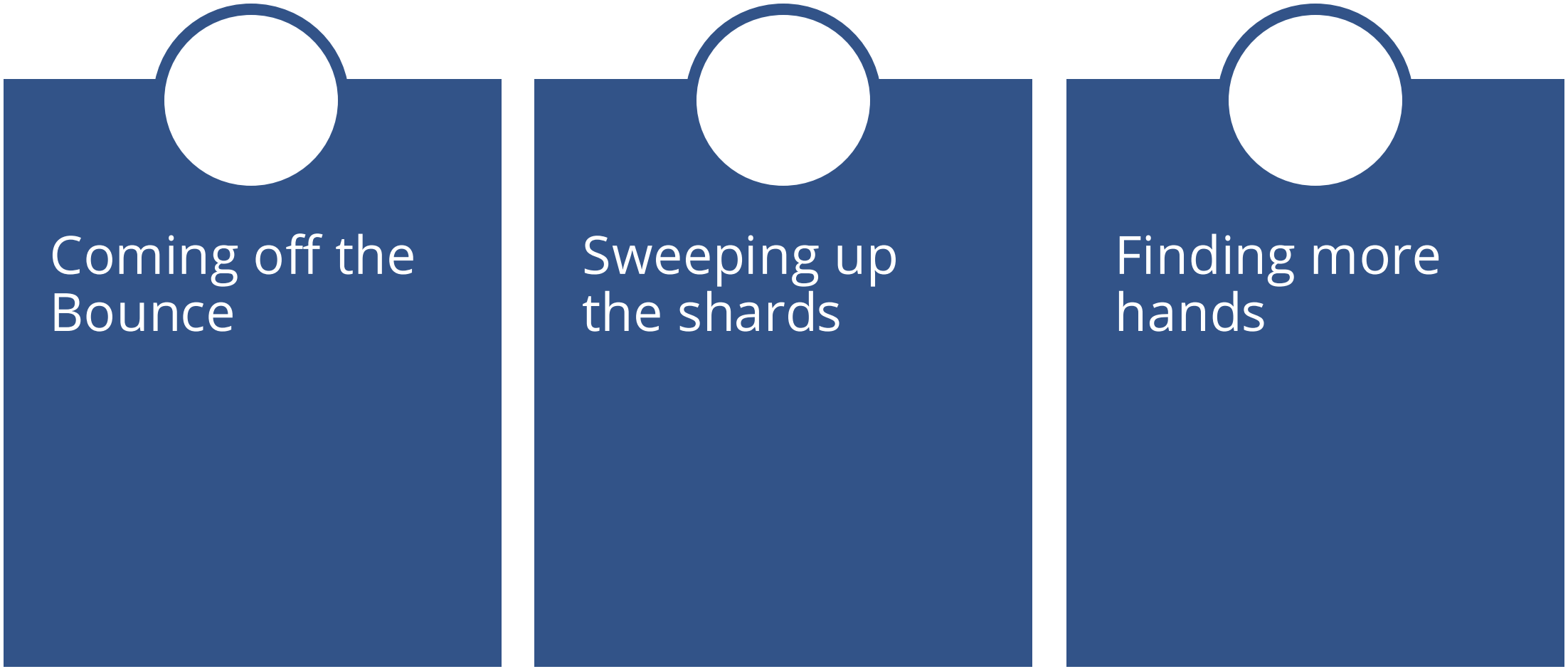
Start asking… “Where do you go?”

Hard Times

When Things Go Wrong

- Some things are glass balls, they shatter if you drop them
- Some things are rubber balls, they'll bounce, but you have to stoop to catch them

Handling Customer Service Failures



Questions?

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