

COMPLIANCE BULLETIN

Is Your Success Long Lasting?

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How solid are your business relationships?

*If you're not building and maintaining client relationships,
your success will be short lived.*

What is your client investment?

Do you invest in?

- **Client time** (or are you always in a hurry)?
- **Listening** (do you hear their needs – what is important to them)?
- **Understanding** (do you have a good sense of what is important to the consumer)?
- **Knowledge** (a thorough comprehension of the product you are offering)?
- **Offering a solution** (only if it's suitable)?
- **Attention to detail** (do you review carrier paperwork prior to sending)?
- **Client appreciation** (do you promptly return calls **or** reach out to the client 30 days after the policy's effective date and 90 days thereafter)?

Don't make assumptions – find out:

- Who they are
- Where do they come from?
- What's important to them right now?
- How do they make their decisions?
- What are they afraid of?
- What is important to them in the future?

It takes time and patience to build a relationship and to build trust.