

Agency Webinar Series

Doing business in the new normal means thinking differently about our goals, resources and skills. It requires that we focus on internal aspects of our business so that employees align to and love their workplace. Afterall, they are the best marketing asset we have.

During the webinar series, we invited guest speakers to share what's happening in the industry, how our customers are impacted, and what agencies can pivot toward as we look to the future; a future that may look vastly different than before.

A special thank you to our guest speakers:

- Stacey King, Digital Content Director, Agency Nation
- Mike Wnek, SVP of Operations, TrustedChoice
- Matt Lehman, Chief Digital Officer, Westfield
- Peter Van Aartrijk, Co-founder and Principal, Chromium/CEO, Aartijk
- Sara Tester, Corporate Marketing Leader, Westfield
- Scott Addis, CEO, Beyond Insurance
- Jim Caragher, Managing Partner, CIB Group

CUSTOMERS WILL NEVER LOVE A COMPANY UNTIL EMPLOYEES LOVE IT FIRST. SIMON SINEK

Start with "Why"

The insurance industry is ready for disruption and independent agents play a very important role regarding expertise and insight. The very fact that you are a local presence and participating in your community affords a unique opportunity to truly understand your customers and employees. It's a great place to start with your "Why?".

Identify your value proposition

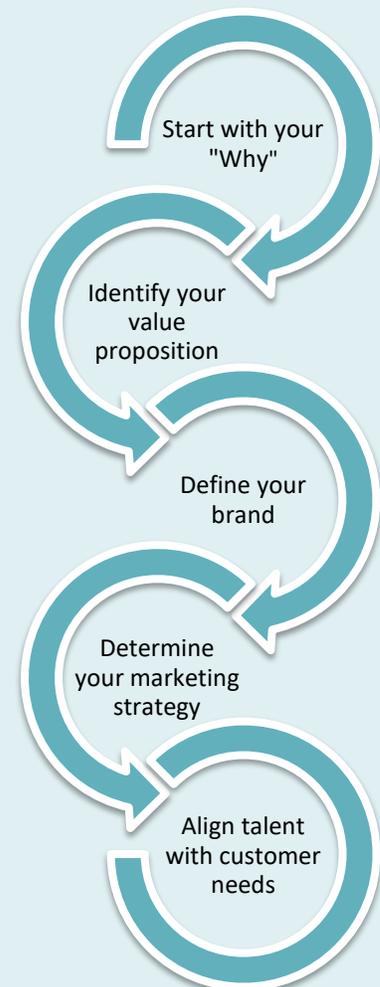
A value proposition is an authentic representation of the unique capabilities you bring to your customer – a true reflection of significance. When you define your agency value proposition, be sure it's based on actionable ways to provide for both employees and customers needs. It will be the foundation upon which you can differentiate your business.

Define your brand

Brand is not a statement; it is your business culture in action. And it represents the actions associated with your core values. Brand drives how you position your business in the market.



The Bottom Line



Doing business in the new normal requires hyper-focus on a value proposition that reflects your agency brand, culture, unique capabilities and values in an industry striving for digital legitimacy and empathetic processes that advise and guide consumer behavior during periods of uncertainty.

Determine your marketing strategy

We know that customers continue to shop but that they are shopping for something more than product. They are shopping for a dependable process – an advisor. In many ways, we equate selling to marketing, but they are really not the same.



When you create a marketing strategy, you commit to:

- Defining the products and services you will offer
- Incorporating social media
- Leveraging technology and technology resources
- Seeking consumer, industry and risk insights
- Understanding customers and what they seek or need

All these marketing levers help create differentiation, which enables you to execute an effective sell strategy.

Steps to Trusted Risk Advisor...



CONSUMERS DEFINE WHAT DIFFERENTIATES YOU.

Align talent with customer needs

Today, more than ever, addressing consumer needs requires a shift in our traditional industry mindset. We know that attitudes, beliefs and methods drive our decision-making. When we account for the shift in the consumer risk plan, we can't ignore our responsibility to respond – differently.

And that means that building a group of advisors requires thoughtful planning and training to ensure an individual has sales acumen, a drive to win, resilience and fit for your agency.

We can't do today's job with yesterday's methods and expect to be in business tomorrow ~ Unknown



But we can shift our mindset to new ways of operating, selling and recruiting. And together we can help position each other for what's to come.

A new mindset:



Build Your Own Basic Training

- Reinforce empathy and active listening.
- Teach the “sale is different.”
- Employ process vs. product approach.
- Arm producers with tools and tactics.
- Incorporate a risk management process and matrix into your team value proposition.

Resources

To Sell is Human, Daniel Pink
The Purple Cow Leadership, Seth Godin
[Elevate Conference](#) by Agency Nation
[Lead Generation](#) by Trusted Choice
[Return to Normal Checklist](#), MHA Consulting
[Pandemic Planning Template](#), TechTarget

Westfield Contact

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Email: AgencyCommunication@westfieldgrp.com with any questions you have regarding this information.