

SECTION

04

Showcasing your agency's community involvement provides an opportunity to connect with prospects, clients and potential new hires on core values.

Community Involvement



TELL YOUR STORY BETTER:

Showcase Your Agency's Community Involvement

As an insurance professional, it isn't easy to project a positive image given consumers overall skepticism and even cynicism about the industry. And it's made even more difficult as exclusive agency insurance carriers spend billions annually on promoting their own brands in consumers' eyes.

As an independent agent, you have the challenge—and terrific opportunity—to advocate for your agency's brand and how you are able to provide customized solutions from more than one carrier.

Reputations and relationships matter.

Since insurance is an intangible product, building trust and credibility is vitally important. In the age of advertising “puffery,” how can your agency instill trust and credibility, particularly among your primary target audience?

President Theodore Roosevelt said:

“People don't care what you know until they know that you care.”



So what is a meaningful way to convey that you care so it resonates with consumers?

➔ **Highlighting your agency's community involvement.**





Community-based marketing is similar to cause-based marketing.

While the two approaches may overlap, the chief distinction with cause-based marketing is that the agency aligns with a social, charitable or otherwise worthwhile cause for a specific immediate need. For example, helping a family displaced by a fire; an annual event, such as “Toys for Tots” during Christmas; or a long-term sponsorship, such as the Special Olympics. This may be a better fit when the community your agency serves is more regional, national or even international.

Aside from current and prospective customers, another important audience for your agency’s community involvement is inside your own doors: Agency staff and potential hires.

It’s worth noting that an Ernst & Young survey found that almost two-thirds of Generation Z workers feel it is “very” or “extremely important” to work for employers that share their values. Their work life is defined by value, not money.



TWO-THIRDS

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Assess What Is Working

If you haven't done it in a while, now is an excellent time to audit your agency's community efforts.

Get your team together—in a smaller firm, that might be everyone—and let them play a key role in deciding:

- What local, regional or national causes do they enjoy supporting and working with the most?
- Which new or different causes could your agency support?
- Are there some you might consider moving away from due to lack of recognition, follow-up, results or overall energy around them?

One agency owner said he supports only the causes he hears feedback and thanks from throughout the year. His rationale is that he seeks a two-way street of interaction. He wants to ensure each cause is aligned with the agency, customers, prospects and community.

Another agency whittled down its many local causes to one large one—now it is the primary sponsor of an annual, high-profile 10k race for charity. The associates are enthusiastically involved throughout the year in fundraising and support.



Create a Report Card for Sharing Community Efforts



While it may seem surprising, many independent agencies overlook the cumulative impact of their associates volunteering.

This can encompass a variety of roles: serving on nonprofit boards; youth sports coaching; volunteering activities related to hunger and homelessness; animal rescues; hosting charitable events and fundraising.

There are three primary reasons why independent agencies often fail to communicate their community involvement:

- 1. Public perception.** Some associates feel it is disingenuous to publicize their individual or their agency's charitable involvement.
- 2. Not a complete picture.** Many firms don't perform that holistic "audit" of their community involvement and thus fail to capture all of their staff's volunteer efforts.
- 3. Failure of communication.** There is no one tasked to oversee and execute using the agency's communications assets on a regular basis.

Where to Start

One of the communications challenges that your firm may experience is developing fresh content. Highlighting community events and cause-based marketing initiatives provides fresh and compelling content for your agency's marketing materials, social media and newsletters. And don't overlook the opportunity to reach out to local media—they relish covering community-based efforts, especially when a personal story is involved.

A few of the ways that your agency can share your community activities include:

1. **Website.** Dedicate a section of your site to your community involvement. Include photos and testimonials from community members and details about the causes you support.
2. **News releases.** Send news releases to local newspapers, magazines and online news platforms about your agency's local support, community involvement and upcoming volunteer activities.
3. **Newsletters.** Feature stories about your community work in email newsletters to clients and prospects.
4. **Events and sponsorships.** Sponsor local events or host your own community service events. Use these opportunities to engage with the community and showcase your local commitment.
5. **Client communications.** Mention your community involvement in client meetings, proposals and other messaging to highlight your agency's values.
6. **Social media posts.** Regularly share photos and stories of your associates participating in community events or volunteering. Use hashtags and tag local organizations to increase visibility and remember to ask associates to repost the agency's posts on their social media.



Note that your agency's social media presence isn't a nice-to-have tool. In his research, British biological anthropologist and evolutionary psychologist Robin Dunbar found that an individual typically can maintain only 150 meaningful personal relationships. He also posits that social media does not expand that limit even though the average American user of social networking sites has 634 social ties and spends more than two hours a day scrolling through their social media.

The independent agent must work to find a place among their customers' 150 meaningful personal relationships: Not only must they market the agency on social media, but they also must present it with the authenticity that consumers demand.

Maintain Other Critical Internet Objectives

Highlighting community involvement should not detract from other media goals, such as generating customer reviews on Google, Yelp, the agency's Facebook page, Trustpilot and Glassdoor.

And while some businesses will make a specific pledge, "I will donate 10% of my real estate commissions to the XYZ cause," you cannot predicate a contribution directly tied to a sale, as that would violate your state's anti-rebate rules.

Be extra sensitive on political-related alignment or causes that may be seen as divisive. Since different people have different filters, a smart approach is to ask a few people representing different age groups and backgrounds to serve as an informal sounding board—or an actual board of advisors—for your firm. That way, you can avoid unintended consequences.

IMPORTANT

Be mindful to not violate anti-rebate rules. See below for examples on what to avoid saying and what you can share instead.

DON'T

"Our company donate 5% of all sales to ABC cause..."

✓ DO

"We support local! Our team donates time/money to these causes and organizations..."



Mind Your Reputation

Lastly, reputations matter as much as meaningful relationships. Highlighting your community involvement aids in building both.

Communicate loudly, but sincerely about what you're doing to help families and businesses. You are making the community and the world a better place. The inevitable commission revenue that comes your way will be a bonus.

We offer resources to support your agency in the Hard Market:

Check out all sections within the complete version of the Hard Market Toolkit brought to you by Trusted Choice.



All Sections included in the complete Hard Market Toolkit Expansion:

- Hard Market Overview and Update
- Selling Strategies in a Hard Market
- Enhance Your Communication Strategy
- How and Why to Showcase Your Agency's Community Involvement
- Communication Strategies for Commercial Accounts
- Seven Strategies to Drive Retention for the Long Run
- How to Stop a Cancellation
- Email and Digital Templates
- Extensive Appendix of useful external links, downloads and resources

Download the complete Hard Market Toolkit Expansion:
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