



DOING BUSINESS VIRTUALLY



A great deal of uncertainty remains as we move forward, but there are still opportunities for you to do business and have a positive impact on the lives of your clients and prospects.

WE ARE HERE TO HELP YOU DO WHAT YOU DO BEST

WE ARE IN DIFFERENT TIMES

The insurance industry and, more specifically, the insurance agent is forced to change the way we have done business.

We must adapt to be able to service and help our clients and community. Agents must find ways to market and connect.

Gone for the time being are the face to face meetings, old ways of doing business do not fit the current protective measures.

The good news is our clients need us more than ever. For agents that are willing to adapt, there is a massive need for our services.

THE QUESTIONS YOU NEED TO ASK YOURSELF:

Are you willing to make the changes

How can you effectively communicate and serve your clients

How do we market our services?



Are you prepared to adapt? Before you jump into the virtual business world, make sure you are ready for this new way to connect with your clients.

5 TIPS FOR VIDEO CONFERENCING

- 1. DRESS CODE** We encourage you to dress as you would with an in-person meeting. You will learn that you will engage with the clients in a similar matter.
- 2. LIGHTING AND CAMERA** Make sure you have a well-lit area and that your camera can capture you in a high-quality image. Both of these can take away from the experience your clients will have in the meeting.
- 3. VIEW** Be aware of your shot and surroundings. Make sure the camera has you in the frame and is showing your whole face. Also, be mindful of the background as it will be visible in the meeting as well.
- 4. EDUCATE** Make sure you understand how to access the session. This way, you will be able to give clear instructions to your clients who might not be used to this platform.
- 5. COMFORT** Do not let the different experience or technology change you. Get comfortable so you can come across and relate to your client just like you would if your meeting face to face.

WATCH
THIS VIDEO
FROM CENCO
INSURANCE
MARKETING



CONDUCTING BUSINESS DIGITALLY: Digital tools to meet and engage with clients

Today we have many options to hold meetings virtually. This will allow you to connect and meet with your clients during these times. These have proven to be very useful in being able to connect and conduct meetings with your clients.

ZOOM is a prevalent option within the industry. It is easy to use and carries many functions. They have a free version as well as an upgraded paid version. The free version will work for many. Advisors can hold virtual meetings with clients and or groups. You can screen share as well, so it is useful when going over an illustration or product.

SKYPE is an excellent option for phone calls as well as video calls. It is simple to use and widely accepted. It is better used for one-on-one meetings and might look to others if you will be doing larger groups.

GOTOMEETING Though not as well known as Zoom and Skype, GoToMeeting is a fantastic option to use for virtual meetings. It is excellent to use PowerPoint. It is CRM friendly so that you will see a lot of businesses on this platform.

FACEBOOK MESSENGER is suitable for impromptu meetings. It allows you to video chat through a commonly used platform.

CLICK THE ICONS AND LOGOS TO GO TO THESE PAGES AND DOWNLOAD THE APPS

All of these will offer the essential functions of video conferencing. They will work very on functionality as they each have their strengths. Most offer a free version that would be effective in holding meetings with your clients. We advise exploring the option you feel is the best fit, and getting comfortable with it.



USE THESE ICONS IN YOUR EMAIL SIGNATURE TO LINK TO YOUR BUSINESS PAGES



Social media is an excellent way to engage with your client base and community. It will allow you to stay top of mind and present value to the masses.

FACEBOOK is one of the most popular platforms. You can create a business page to feed information through. You can create ads and ad campaigns easily through this platform to engage with new potential prospects. You can boost your post to reach more people.

LINKEDIN is used for personal and business connections. You can search out specific industries to connect with. It allows you to build ads and campaigns.

INSTAGRAM allows you to link to Facebook for a more comfortable posting. It allows you to connect to new markets and engage with clients. You can also run ads and create a business page.

If you are not utilizing social media in your current business, there is no better time to transition to the platforms and build a strategy to engage with your clients and potential prospects.



SUBMITTING BUSINESS DIGITALLY

Make sure you understand the process of submitting your business digitally. You will need to get comfortable with electronic applications and signatures. This will allow you to process the transaction and gather signatures without having to meet face to face with clients.

Most of the carriers that Cenco Insurance offers have full electronic submission capability. We can assist with the transition to the digital submission.

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