

# COMPLIANCE BULLETIN

## STAYING IN TOUCH WITH YOUR CLIENTS

CB00009

### **Present a Professional Image**

- A sales person should be thoughtful in the choices made regarding dress and grooming. The image presented to the customer is part of the impression the customer forms on products and services!

### **Don't Commit Others to Unreasonable Deadlines**

- Don't promise more than the carrier and everyone involved to execute the transaction can deliver.
- You must not promise a client that they can see any doctor at any time (knowing they cannot)
- Don't over-speculating on a rate of return.
- *Stick to the facts.*

### **Be Courteous at all Times**

- You're bound to encounter rude or overly demanding customers. Be patient; don't be drawn into unnecessary conflict.
- If you're just as unpleasant, the carrier you're representing, your company and **your** reputation will be harmed.
- Follow up on your promises – did you call when you said you would? Were you on time for your meeting? If not, did you call the client and let them know you would be late?

### **Improve your Listening Skills**

- You can't just be an engaging talker or a powerful persuader; you must be a good listener.
- View your customer as a unique individual and treat them that way!
- Solve their problem; fill **their** insurance needs

### **Respond Promptly to Customer Inquiries/Reach out to your Current Customers**

- One of the best ways to make money in sales is to obtain repeat business from current customers.
- If you do not follow up on a regular basis or quickly respond to customer calls (no longer than 24 hours), not only do you reduce your opportunity for repeat sales, you stand a good chance of losing your current, placed business. Don't let your customer "stew" because you're not returning their call.. It can worsen a simple problem.
- Don't wait for your customer to call you; call them no less than every 90 days. Make sure their current plan/policy is working for them
- DO NOT call CMS to fix a Medicare Advantage Plan or Prescription Drug Plan issue. Most likely, this will escalate into a documented complaint from CMS. Work with the carrier or your management to solve the problem.