

Tips for Relationship Building

Clients need someone they can trust and depend on. Through building relationships with potential customers and taking an interest in their world, you can significantly improve the odds of securing a sale. That foundation of trust and care goes a long way towards retaining that client for the long term. Here are some tips to build lasting relationships:

Be transparent

- Always be transparent with your clients.
- Explain your value proposition as a trusted Medicare expert.
- Show how you can offer the products and services they need at an affordable cost.

Be trustworthy

- Be open and honest with your clients.
- Always remain compliant and ethical.

Be polite and courteous

- Always greet your clients warmly.
- Exercise patience and do not rush your clients.
- Ask light questions and do not use industry jargon.
- Offer friendly recommendations.
- Confirm their understanding of the product.

Be a resource

- Prove that customers may rely on you. Be their expert and contact and show they can trust your word and assistance.
- Be able to articulate the plan differences.
- Be flexible when providing information.



Be involved

- Participate in community organizations and events.
- Build lucrative relationships with provider and faith-based organizations.
- Build key partnerships with local politicians and Veterans Affairs services.

Agent take aways

- Do not take a bad reaction personally.
- Know that your clients deserve clarity and simple, reliable service.