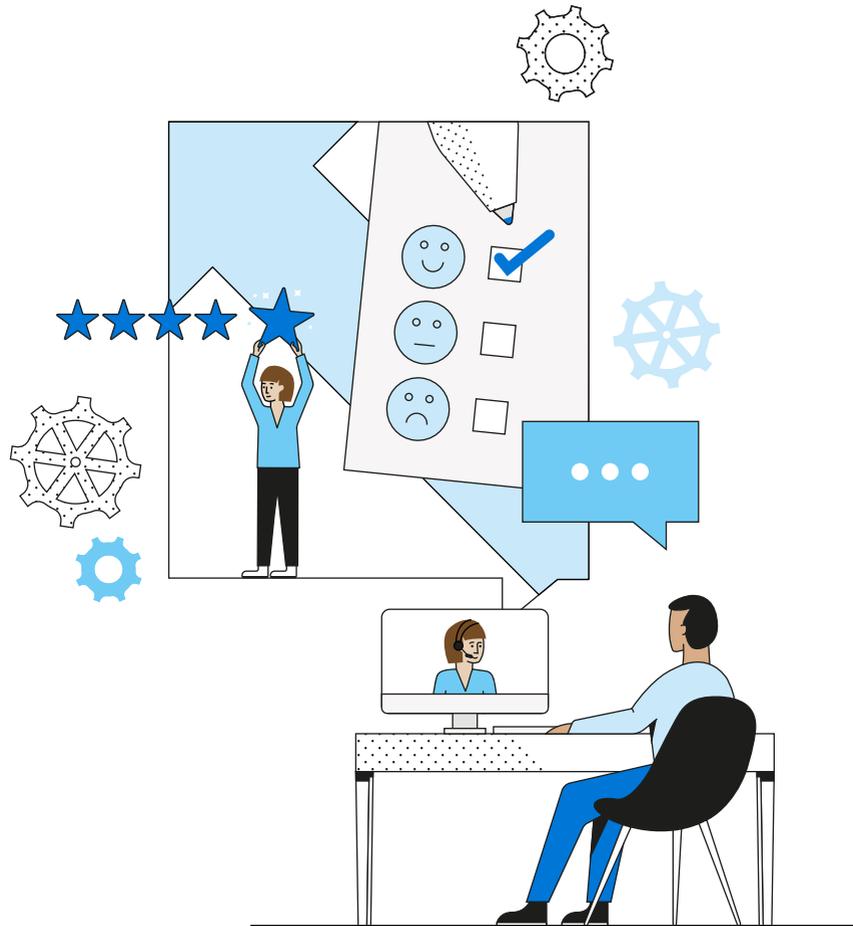


# Increasing client satisfaction

A Distribution Quality Management Programme guide



Most cancellations happen within the first 6 months of a policy, almost 70% of which are Life Insurance Policies. Some of the main reasons for this client dissatisfaction are a lack of customer care and irregular contact. But there are several checks and strategies you can put into practice to make sure you not only retain your clients, but that you provide them with a meaningful service too.

## 1 Set yourself apart from the competition

List your USPs and make sure they're included in your accompanying literature.

## 2 Review your sales team performance

Are they on target, and what do their KPI's demonstrate?

## 3 Optimise your communication routes

Take the time and effort to ensure you're using the best communication tools to their maximum potential.

## 4 Map out your processes

Clients will walk away from poor quality systems, service, processes, staff and outputs. Are there any weaknesses or gaps that you can address?

## 5 Review your script

If you use scripts, use client feedback to review and improve them.

## 6 Manage client expectations

Do your clients know what you can offer them, and what happens next?

## 7 Review your performance MI

What does your performance MI tell you about your clients? How can you use this data to meet their needs more effectively?

## 8 Collect feedback

Ensure there is a clear process in place to collect client feedback. Reviews and endorsements can help you achieve more business.

## 9 Be mindful when purchasing leads

Lead provider data can vary so it's essential that appropriate due diligence takes place before purchasing leads. See our guide to improving lead purchase results for more information.

## 10 Use policy trusts to your advantage

Writing policies in trust is four times more likely to complete and stay in force than policies that aren't.

### Key takeaways to improve satisfaction:

1. Ensure your systems and controls are simple but effective
2. Clearly allocate roles and responsibilities to all members of staff
3. Achieve more by implementing operational effectiveness