

How to Win New Business

10 steps to broker success in the insurance industry.

From payroll vendors to [professional employer organizations](#) (PEOs) and direct-to-employer HR software, your competition is multiplying. Gain confidence you'll be the one employers choose.

1 Understand your clients' needs

The only need that remains constant for employers is their needs change. Check out [Ease's annual SMB Benefits & Employee Insights Report](#) to acquire the latest data to design tailored benefits offerings for your clients.

2 Set a clear goal and track progress

Forecast how much new business you want to win this year by looking at historical data, potential market factors, and then increase it by a measurable amount (dollars or percentage) that is aspirational but plausible.

3 Update your website

The insurance industry is highly competitive and first impressions matter. If you haven't updated your website in more than three years, it's time. Make sure to:

- Update the design and combine it with flawless functionality.
- Break from industry repetitiveness and have your agency stand out.

4 Establish your social media presence

Consistently publish on your social media profiles and implement a plan for social selling.

94%

of employers expect consultation, innovation, and ongoing management support year-round.¹

5 Improve your sales pitch

It should include:

- Specific information you collected by doing research about each prospect.
- The problem they're facing.
- A plan of how your services will help them overcome that problem.
- A vision for their success.
- A clear call to action. For example, share a landing page where they can request a custom quote.

38.67% **of agencies** note the ability to conduct business digitally was a driving factor in [winning new business](#).¹

6 Focus on qualified leads

Not all prospects will be a good fit for you, while others may not be ready to use your services right now. Prioritize your work by scoring your leads so you can focus on the customers most likely to buy.

7 Collect testimonials

After open enrollment, ask your clients about their experience and collect their testimonials in writing or video. You can also create a referral program that rewards your most loyal clients.

8 Become a thought leader

Show your understanding of the various roadblocks employers encounter and offer solutions. Start a weekly series in your blog, newsletter, and/or social media profiles based on prospects and customers' questions such as *"Do I really need to offer vision and dental benefits?"* or *"How do I know if my company is ACA compliant?"*

9 Establish a competitive advantage

Your clients shouldn't have to choose between innovative technology and a great benefits advisor. [Learn how to use technology](#) to edge out your competition.

10 Offer services that add value for your cClients

Meet the ever-changing needs and offer your clients greater value beyond what's expected. Extend your services to [HR tools](#), [payroll](#), [ACA compliance](#), and COBRA.

37.52%

of agencies offered more support to clients by helping them onboard new hires online, conducting benefits elections remotely, and providing compliance support.¹



Through simple technology and powerful partnerships, you can better serve your clients during open enrollment season — and the rest of the year, too. A whopping **80% of Ease users won new business** this past year, while non-Ease users won just 11.6%.¹

Reach out to us and learn more.

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Because benefits matter.