

Operations Training

Proactive vs Reactive Service

Purpose: Identifying the Proactive vs Reactive models of servicing clients and understanding the value of being proactive.

Preparation: None (may want to think of examples of proactive and reactive service situations in the agency).

Facilitator: Divide the group into small groups (no more than 4 in a group). Ask each group to pick a topic and have them answer the following questions:

1. What could/should be done proactively to make sure this situation as productive as possible and make the client happy?
2. What are things that many agents do reactively pertaining to this scenario?
3. What value does the client receive with a proactive approach?
4. What policies and procedures could we put in place to guarantee we are proactive?
5. How does our client experience get reflected in being proactive vs reactive?

TOPICS

1. A claim
2. An initial insurance quote in any line of business.
3. An insurance company change that will impact most/all clients during the year at renewal.
4. Client management throughout the year.
5. Other?

Facilitator: Have each group share and ask the group if any items can be added or deleted in their opinion.

Have the group share any examples of how being proactive helped them with a client or prospect in the past. Give an award or something special to any person that shares.