5 tips to nurture relationships and plan successful enrollments

As a broker, you know relationships are everything. But as businesses and workplaces become more varied in their "normal" work environments, you may find it more difficult to stay connected to your clients.

Regardless of the new normals we're experiencing, we'd likely all agree that relationships are more important than ever. And perhaps that's even more so the case with clients who have depended on your expertise over the past few years. Nurturing those relationships can be a winning business strategy.

Here are five reminders and tips on relationship-building in today's environment as we all look ahead to enrollments and annual planning.

1. Nurture relationships year-round.

Continue to let your clients know you are there for them all year long. Cultivating ongoing relationships with your clients means that you're likelier to hear about opportunities, bids and RFPs with them before they come to fruition.

The great majority of employers feel their broker provides them with valuable consultation, beyond simply presenting benefits options. In fact employers who receive support and advice from their brokers tend to be much more satisfied with the relationship.[1]

2. Ask – and answer – questions.

If you don't understand the need, you can't fix it. And if your clients don't understand the enrollment strategy you present to them, they're not going to make the most of it. One way to make this easier is to draft questions, review their phrasing and send them to clients as a bundle. Consider keeping a running list of questions in a convenient place so you can address them with your clients all at one time, alleviating the need to ask numerous questions at various times. Then note how your clients respond, and consider whether that process will be appropriate to "mirror" when it comes time for you to answer their questions.

3. Understand your clients' digital user experience.

If the future of enrollments and customer service is digital, it's important to know what kind of service your clients are getting when you're not around. Do a mock walk-through from your clients' perspective of any technologies or portals you ask them to use. Is the user experience simple and intuitive? There might not be much you can do immediately to create a better user experience, but the more you know about your own systems, the better equipped you'll be to discuss them with your tech team and partners.

4. Consider measuring your relationships.

You know that your success is about more than the sales numbers; it's about the quality experience you provide to your clients. Do you meet their expectations? Do you provide helpful support, even in small ways? Are you transparent in your communications? Do you give your clients an opportunity to provide input? Measuring such categories can help deepen your relationships.[2]

5. Share in the human connection.

While personal attributes such as empathy and compassion have sometimes been portrayed as vulnerabilities, they've gained respect as our landscape continues to transform. Empathy enables you to put yourself in your clients' shoes, helping you to better understand their concerns, fears and expectations. By showing genuine understanding and compassion, you help foster trust, loyalty and open communication with your clients, which can ultimately lead to better outcomes for both them and you.

[1] LIMRA EY. "Harnessing growth and seizing opportunity: the future of workforce benefits." October 2021.
[2] Intuit Quickbooks Blog. "6 keys to successful client relationship management." January 14, 2022. Accessed 10.10.23.