

Challenge #2: Turning Clients into Advocates

*“The secret of retention is to learn to turn customers into clients.
The secret of developing totally new accounts is to turn clients into
advocates.”*

Prospect Like A Pro

Let's test your definitions. Define the three terms listed below. Feel free to look them up in the dictionary or discuss them with others.

Definitions:

Try to make a distinction that is meaningful.

Customer:

Client:

Advocate:

When you have come up with the best definitions you can develop, proceed.

Turning Clients into Advocates

Our Definitions:

Here are definitions developed from a review of Webster's Dictionary:

A Customer: Someone who buys from you

A Client: One who is under your care

An Advocate: One who pleads the case of another

Can you see how a client would be more valuable than a customer? Can you see how valuable an advocate would be?

Advocate Principles

See if these principles for turning customers into clients and some clients into advocates seem legitimate based on your experience.

- The majority of your accounts will come to you as customers. The challenge is to turn them into clients.
- Some of your customers will never become clients. They will continue to shop around and treat insurance as a commodity. Eventually they will leave for something that is cheaper, easier, or faster. Allocate your energy accordingly.
- A few of your clients have the potential of becoming advocates. You will never have enough advocates; treat them like gold.
- You do not create an advocate; you discover one. Then you help that person find ways to send you business.

Do these principles ring true for you?

Turning Clients into Advocates

The Starting Point

The first step is to turn customers into clients. Success in this area will improve your retention, reduce frustration, and make your book more profitable. List three things you could do to turn customers into clients:

1. _____

2. _____

3. _____

Return to this question on a regular basis. The answer will change as your skills develop. Answering this question will make you rich in more ways than one.

Turning Clients into Advocates

The Next Step

Some of your clients have the potential to become advocates. Use the five building blocks to discover potential advocates among your clients.

Although we may not even fully understand why, an advocate wants to see you be successful. In this case, this fact is your **unique advantage**. Maybe they are impressed by how hard you work. Maybe they knew your father. Maybe you remind them of themselves in a younger day. If you can determine the tie, you will be better equipped to strengthen it. If you never figure it out, simply treasure it.

The advocate is **motivated** by a desire to help you and create opportunities. You should be aware of this motivation because it will influence the entire relationship.

Can you think of someone who could be an advocate for you? Constantly be on the lookout for a potential advocate. Try to answer the following questions regarding an advocate.

Image

What would this person have to see in me in order to tell others about me? What **image** should I be projecting?

Please answer this question
before you move on.

Turning Clients into Advocates

Our Answer

What image should I be projecting?

Few people want to help someone who does not have a chance for success. Perhaps, a potential advocate should see you as someone determined to make it.

Few people are eager to help others who will not help themselves. Maybe an advocate should see you as someone who is willing to do the work necessary to be successful.

Few people want to help someone if the help is not appreciated. Perhaps, an advocate should see an opportunity to be a part of your success.

Continue to explore this question. If you do not project the right image, a potential advocate may just decide it is not worth the effort.

Asking

What is the best way to ask a potential advocate for referrals?

Again, please answer this question before you move on.