

Strengthen Customer Relationships

Why you need a Welcome Kit and Agency Newsletter



New clients are far more likely to leave an agency in the first 30-60 days after signing a policy. A personalized New Client Welcome Kit and consistent touches with an agency newsletter are proven tactics to build trust and remind your clients of the value you add as an agent. Communicate with newsletters and send New Client Welcome Kits to create a special bond and drive stronger relationships, multiply referrals, and boost your overall agency retention. Here are some easy ways to get started.

New Client Welcome Kit

A great first step in solidifying strong relationships with new clients



Why use a New Client Welcome Kit?

A Welcome Kit is the perfect way to initiate your marketing communication plan. You can use it to share your agency's personality, introduce your referral program, improve customer retention, and assure new clients they have made the right decision to do business with you.



Your New Client Welcome Kit templates

We've created a series of templates and guides to help you populate content. Before you know it, you will have a personalized Welcome Kit and you'll be on your way to increased new business. Welcome Kit templates include:

- Welcome Letter
- About Our Agency
- Meet Our Team
- Community Involvement
- Referral Program
- Claims Information
- Client Testimonials



Creating your New Client Welcome Kit

We're offering you a few different ways to create your New Client Welcome Kit:

- For our business lines agency partners, visit the [Digital & Relationship Marketing](#) site at Helping You Succeed to read through the New Client Welcome Kit instructions and download the customizable Microsoft Word templates. Finishing can be done by printing in your agency or at a local print shop.
- For our personal lines agency partners, access our automated, easy-to-use form-fill tool through the Marketing Solutions Center at safeconow.com/MSA to create and print your own personalized agency New Client Welcome Kit. To help you ensure you've created the perfect Welcome Kit, we've added new features, including instant text display, photo upload with formatting, auto-save and an option to send to a marketing coach for review and feedback.**



Did You Know?

On average, agents that implement a new customer Welcome Kit see an

11-point

increase in new business policies*



"This program helped us get a completed kit ready and out the door! We could not be more pleased with everything this program has to offer."

*Agent
Jackson, Mississippi*

*Compared to a control group. 2018 Liberty Mutual study.

**The automated kit is only available for Safeco Personal Lines agents at this time. Coming soon for Liberty Mutual Business Lines agents.

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Agency Newsletter

Establish ongoing communication with your clients



Why use an Agency Newsletter?

After initiating communication with a New Client Welcome Kit, utilize an Agency Newsletter to reach out to your clients proactively and establish regular contact with them. Agency Newsletters, whether hard copy and mailed or emailed, can be personalized to remind clients of the value you add as their trusted advisor and can include information about your staff, community involvement, personalized articles, and a letter from your agency principal. Newsletters are also a great way to keep customers informed about your referral program, allowing you to grow your book, increase profitability, and close more business.



Our improved Agency Newsletter Program now includes:

- Instant text display
- Customizable masthead and fonts
- Photo uploading with formatting
- Auto-save
- The option to send to a marketing coach for review and feedback



Getting started with your Newsletter

There are a few ways to easily create your Newsletter:

- Our eNewsletter and Postcard Builders, available for both business lines and personal lines, are two new tools to help you easily put together an engaging newsletter for email or print. With both tools, you are able to write your own copy or choose from a variety of pre-written articles that you can personalize with your own content and images. Try the [eNewsletter Builder](#) here.
- For our business lines agency partners, visit the [Digital & Relationship Marketing](#) site at Helping You Succeed to read through the Newsletter Quick Reference Guide and download the customizable Microsoft Word and Publisher templates.
- For our personal lines agency partners, access our automated, easy-to-use form-fill tool through the Marketing Solutions Center at safeconow.com/MS to create and print your own personalized agency Newsletter.



Have questions or need a little more help?

If you have any questions or simply need a little help getting started, be sure to reach out to your Territory Manager or email agentprograms@libertymutual.com or agentprograms@safeco.com for more details.

Did You Know?

In the first year alone, agents that consistently send out a hard-copy Newsletter can see an average of:*

6-points of new business lift

2-3 times more referrals

1.5-point increase in retention



"I would recommend this program to any agency that wants to connect with the people and the community they work with on a more personal level."

*Agent
Jackson, Mississippi*