

Client Development Skills: How to Run Effective Meetings



Featured Speakers



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About Ascend With Argo

Education. Insight. Connections.

Training, support and mentorship for early-career insurance professionals:

- Webinars
- Shadow days with Argo employees
- Exclusive events and conferences
- A web-based training portal and content



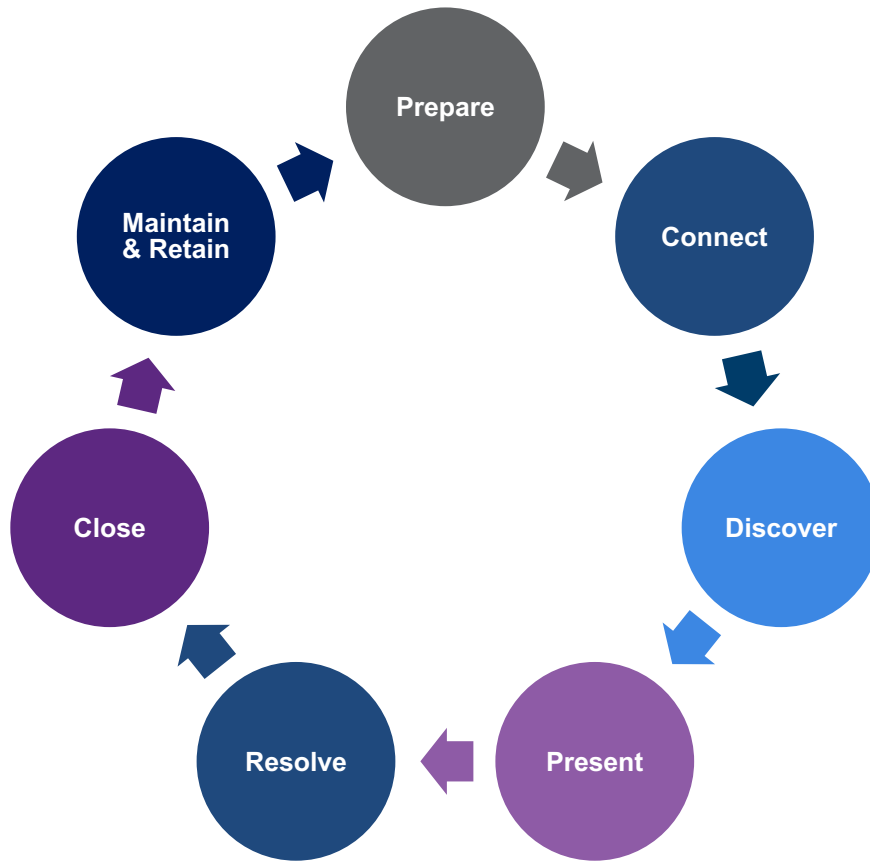
Agenda

What we'll cover today:

- The Client Development Process
- How to prepare for a meeting
- How to run an effective meeting
- Best practices for following up after a meeting



The Client Development Process



Learn more about the Client Development Process in our webinar, Client Development Skills for Insurance Professionals.

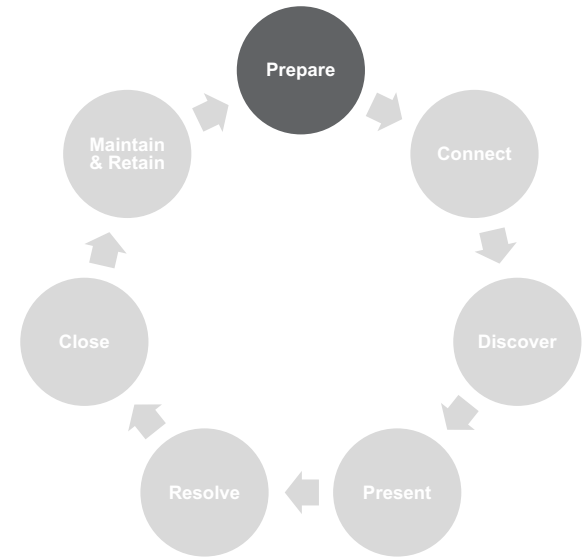
The replay is available at argolimited.com/ascend-with-argo/.

The Client Development Process:

PREPARE

Planning a Meeting

- Determine whom to visit or call.
- Send a calendar invite.
- Develop a written agenda.
- Provide the client with a proposed agenda.
- Confirm the appointment.
- Include the meeting location's address.



Planning Tool

Sales/Marketing Call or Visit Planning Worksheet

Client / Prospect (Individual & Company Name)	
Broker Contact	
Line of Business	
Date / Time of Meeting	
Location of Meeting	
Participants in the Meeting	
Decision Makers in the Meeting	

Client Status
 Step in the Sales Process? Prepare Connect Discover Present
 Resolve Close Maintain & Retain

Call / Visit Objective: _____

Data Gathering
 The following data sources will be helpful to me as I prepare for this meeting:

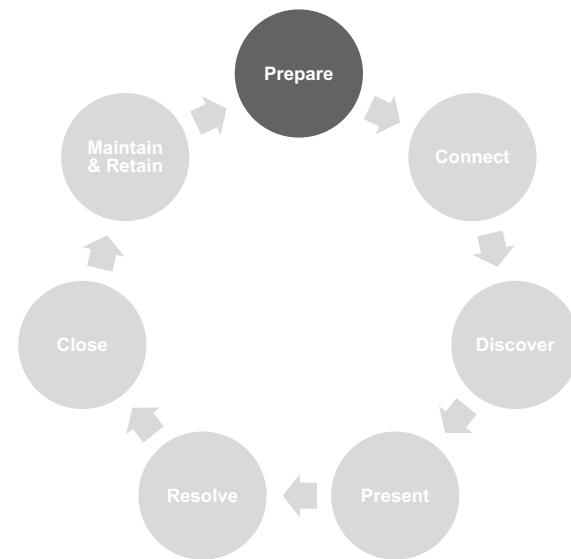
The following individuals will be helpful to me to learn more about my client and their needs:

Preparing

I plan to open the conversation by...	I plan to close the conversation by...
I anticipate the following objections to my requests...	The ideal end to the meeting is...
I assume the broker has the following needs...	The main issue from the last communication was...

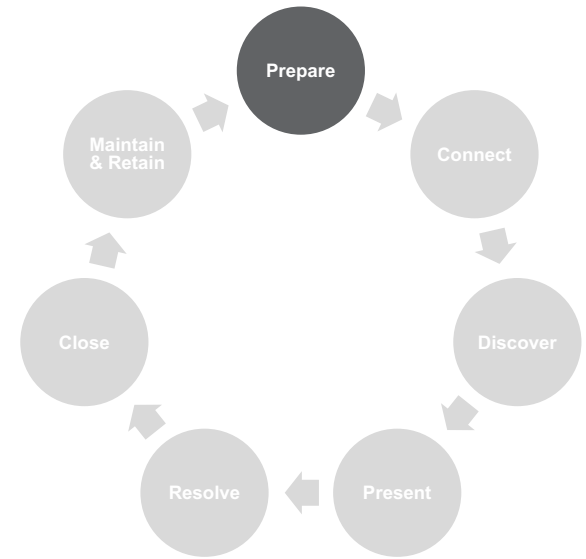
Differentiators

The main competitors to this business are...	The benefits to the client of this business are...
What differentiates me from the competition is...	



Writing an Effective Agenda

- Be concise.
- Collaborate on the agenda with other attendees.
- Make sure the agenda includes the current issues that the client needs assistance with.
- Note the attendees and their titles on the agenda.
- List topics that will be covered during the meeting.



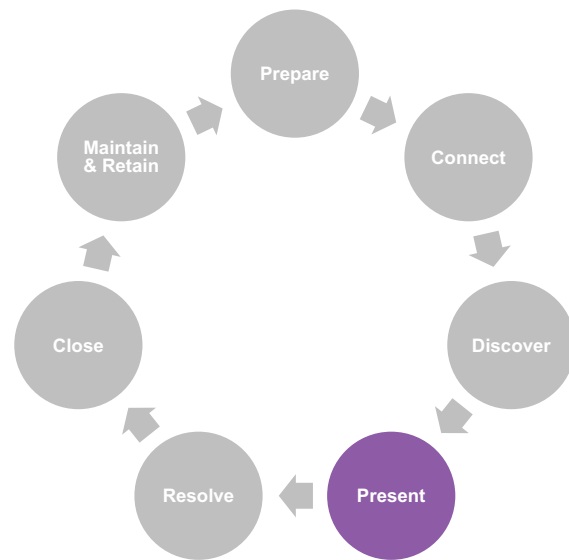


**What happens when
you don't prepare?**

The Client Development Process: **PRESENT**

Conducting the Meeting

- Be professional.
- Use your agenda.
- Listen.
- Include the entire group by asking questions.
- Look for problems you can provide a solution for.
- Look for opportunities you hadn't thought of before the meeting.



Starting a Meeting

- Start on time.
- Build rapport.
- Frame it up:
 - “I just want to confirm we have *[X amount of time]* together.”
 - “Here’s what we said we want to cover: *[X, Y, Z]*. Anything else you want to add?”
- Introduce everyone sitting at the table.
- Take notes.

In-Person Meetings vs. Phone Meetings

In-Person Meetings

- **Be present.**
 - Silence and put away your phone.
 - Make eye contact.
 - Be engaged.
- **Observe the room.**
 - Facial expressions
 - Posture
 - Body language (smiles, raised eyebrows, tiny frowns)

Phone Meetings

- **Get ready for the call.**
 - Remind everyone to mute their phones.
 - Remember to frame up introductions.
- **Come even more prepared, because you can't read the room.**
- **Address silence.**
 - Silence is OK.
 - Recast questions.
 - Direct questions to specific attendees.



Ending a Meeting

- Ask questions.
- Recap:
 - Next steps
 - Who will be responsible for each step
 - When it will get done
- End on time.
- Thank everyone.

After a Meeting

- Send a follow-up email before the end of the week.
- Thank attendees.
- Recap follow-ups.
- Pass along information from other departments – “carry their mail.”

Do what you say you are going to do.



Follow-Up Email: **Miss**

Subject line: Hello!

Hi everyone,

Great meeting you at WSIA. I enjoyed our conversation. We will be in touch soon with our follow-up items.

Looking forward to a great year!

Leah

Follow-Up Email: Hit

Subject line: WSIA Follow-Up – Argo Group/[Client]

Hi everyone,

Thanks for your time this week at WSIA. I captured a number of takeaways and action items from our discussion, which I've outlined below:

Category/Division	Information Captured	Assigned To
Property	<ul style="list-style-type: none"> Client needs the appointment. Leah and client to reconnect on feedback and next steps by end of next week. 	Leah Ohodnicki
Casualty	<ul style="list-style-type: none"> Client needs more information on endorsement process. Mallorie to follow up with internal team members and then follow up with client by end of month. Client values new business and value continuity. 	Mallorie Harper
Contract P&C	<ul style="list-style-type: none"> Hosting a web conference with all brokers on October 12. Mallorie to get client additional details on conference by end of week. 	Mallorie Harper

Let me know if I've missed anything. Looking forward to a great year!

Best,

Leah

Summary

1. **Prepare:** Use the planning tool and agenda template to help prepare for a meeting.
2. **Observe:** Observe the room and take notes during a meeting.
3. **Follow up:** Send a clear follow-up after a meeting and do what you say you are going to do.



Career Perspective

One Last Piece of Advice

It's OK not to know everything.

- Identify where you need additional support.



**What questions
do you have?**



Get in Touch

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www.argolimited.com/ascend-with-argo/



Thank you.