

What Do Clients Want From their Brokerage Firm ?

“Size Doesn’t Matter”



Business Insurance

“In Selecting a Broker, Size Doesn’t Matter”

7/20/2009 Issue

What Matters to Clients (Survey)

1. “depth and quality of **services**,”
2. “**knowledge and expertise**” ...**people**
3. “the right people” ...**accessible**
4. “access to insurance **markets**”
5. “**culture** and **relationship**”
6. “serve ...**extension** of the risk **dept.**”
7. “leverage **technology**”

Or a client might say it this way...



*“Any consulting firm we choose will of course have access to the markets we need, that is a given. Most importantly its organizational culture will have created a team of knowledgeable professionals who are responsive and readily accessible when we need them. Our broker will know how to **leverage technology** to assist us and build the type of strong relationships we need so that their team can serve as an extension of our organization in the risk, HR or employee benefits areas.”*

Does this Describe a Business Social Network or a Benefits Consulting Firm...

Or Both?



Not surprisingly clients and prospects still want the people connections that are the hallmark of our industry:



Culture
Knowledge
Accessibility
Responsiveness
Competence

People and Relationships...

And now they expect your team to “leverage technology” connections on their behalf...



So two question arise...

Is Your Firm up to the task of meeting your clients Technology needs and expectations?

How do you compete on this new level playing field against national and local firms of any size?