SIG Contact Methods; Identify and Categorize your Clients

Course Summary

In this session, we explain different communication methods and the different ways to identify and categorize your clients. Also explained will be your tools, contact methods and available reports.

Course learning Outcomes/Competencies

After attending this session, you will understand*:*

- *How to identify and document additional information in the client file;*
- *Categorize your client files;*
- *Use the different communication methods with clients; and*
- *Generate reports and target lists from the Marketing module with these criteria.*

Resources*:* SIG User Guides

Course Outline

Identification in client files

Identifying additional information is necessary to meet the communication needs adequately with your clients.

- *Profile Questions*:
  - Use questions from the client profile to document useful and client specific information like: membership card with an association like CAA, FADOQ, etc., last update date, etc.
  - Setup separate questions for Personal and Commercial files.
  - Setup the format for the answers to shape the expected results.
  - Analyze your internal needs and set them up so users can use this module efficiently.
- *XDates:*
  - Enter policy expiration dates for which you want to prospect that are not presently in your portfolio, prioritising the use of default suspense setup.

- Indicate if a client must not have late fees applied, billed fees and reversal fees.
- Determine if the billing address has to be different from the one in the client file.
- Setup the address on the invoices and on the receipts to the client's or the applicant's name.
- Indicate the prioritized contact method for this file.
- Identify clients, with a target list from the Marketing module, that have already been identified.

Categorize your client files

You must be able to categorize your clients for report, volume categorization or even the financial status of the account.

- Use the client class to: categorize by sector, financial status of this account or group policies etc (class 100 000 $ or +, Gold, VIP, in collection, financing)
- Ability to generate Reports based on Client Class
  - Renewal List
  - Production Report
  - Summarized Aged Accounts Receivable.
  - Marketing Module

Communication Methods

You must be able to communicate with your clients as efficiently as possible. Here are the different communication methods:

- E-mail directly from the client file and document the activity with the activated preferences setup.
- Text message from the client file.
- Prepare form letters to clients from the renewal list to announce new products or coverage's, use the target list from the Online Renewal List screen.