

Source



Deepen Your GI Pipeline's R.O.O.T.S

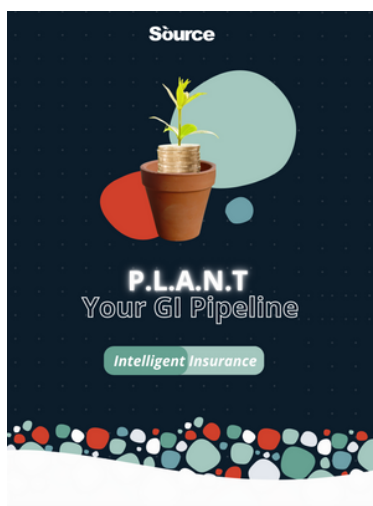
Intelligent Insurance

Deepen your GI Pipeline's R.O.O.T.S

The final part of our GI pipeline eBook series focuses on securing long-term success. General insurance isn't just a one-off opportunity; it can be a strong way to maintain ongoing relationships with clients year after year.

It's not just about improving your services, income and back-book through the use of GI; it's also about shifting your focus to sustaining and scaling your business model, utilising GI as a strategy to offer an expansive experience to your clients.

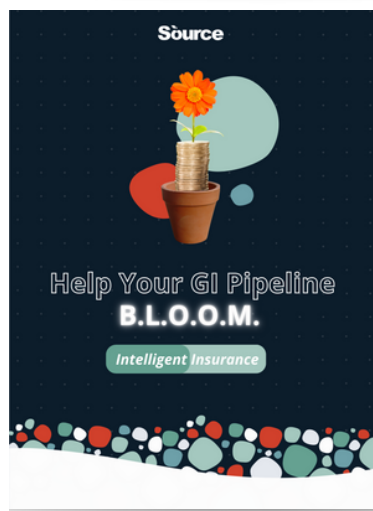
You've planted your seeds and started to see your business flourish, now it's time to deepen your R.O.O.T.S. and nurture your GI offering.



Missed the first one in the series?

P.L.A.N.T Your GI Pipeline

[Read the eBook here](#)



Missed the second one in the series?

Help Your GI Pipeline B.L.O.O.M

[Read the eBook here](#)

REVIEW

Stay connected with clients by checking in with them ahead of their renewal.

Ensure your clients' coverage still meets their needs and lifestyle before they consider alternatives. Comparison sites only go so far in providing consumers with cover that's not right for them and their homes. It's up to you to secure your clients for renewal through your own efforts before they go elsewhere, potentially leaving themselves underinsured.

By reigniting conversations and staying present in the months leading up to your clients' renewal dates, you keep yourself fresh in their minds and solidify your position as an expert. Prove to your client that they're not just a one-time number in a long list of customers; they're a unique individual in need of support from an experienced head – that's you!



Top tip:

Use your CRM system or diary to flag key dates, such as renewals, and schedule regular intervals to re-engage with your clients before their policy expires. You can schedule emails, letters, or even phone calls to check in and ensure your client knows you're there to support them.

Small gestures like these, while persistent, can solidify trust, prompt reviews, and show your genuine interest in their long-term coverage.



OBSERVE

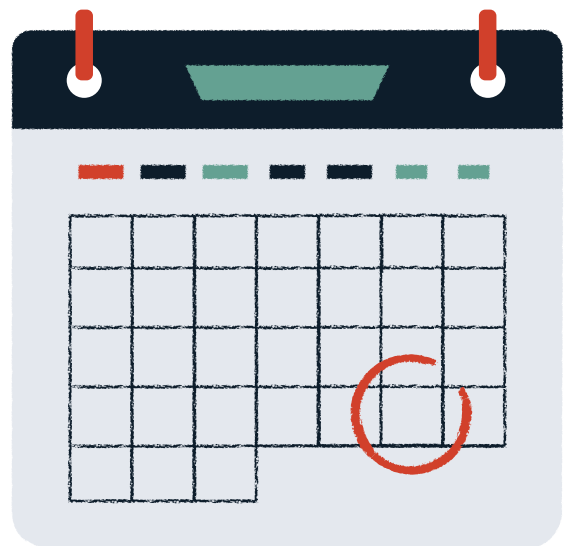
Be proactive!

Life changes, such as getting engaged or renovating a home, can impact insurance needs. It's up to you to identify these milestones and guide your clients to the proper coverage. These life changes often present new risks or aspects that require adjustments to policy details to ensure continued protection.

You can keep an eye on these changing circumstances and help stay ahead of the competition by identifying potential gaps in coverage before they materialise. This shows you're not just reactive, but receptive and genuinely invested in ongoing security.

Build on your calendar's key dates:

Set up periodic client check-ins, whether quarterly or biannually, to ask open-ended questions, such as, "Has anything changed recently in your life or home that might affect your insurance?" By being proactive and keeping conversations flowing, you uncover hidden opportunities to amend or upgrade cover and solidify your stance as a thoughtful guide.



OPTIMISE

Use tools like Share Quote and Premium Saver, along with referral systems like Source Go, to tailor your approach and increase your chance of conversion.

No two clients are the same, which becomes evident after your first couple of home insurance quotes. Due to this fact, it's ideal to utilise the tools available to you. Share Quote, for example, will offer you more flexibility in your quoting, ensuring your clients feel empowered and more engaged in the process.

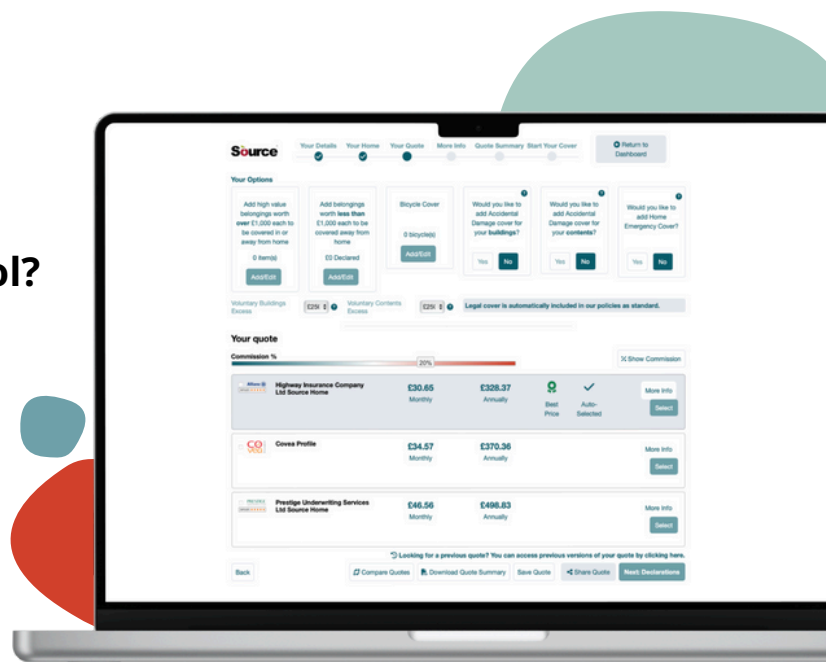
For clients in need of a budget-centred experience, Premium Saver allows your clients to access competitive quotes at a glance, utilising indicative prices and innovative technology. Their quote can then align with their needs and budget in a symbiotic manner.

Source Go, on the other hand, is a helpful platform for conducting your GI when serving clients with time constraints, or those who prefer to complete a quote on their own with no assistance.

Interested in our Share Quote tool?

Boost your conversion rate by 45%

[Log in to give it a go](#)



TRACK

Staying informed helps you stay in control.

Monitor renewals, pending commissions, and key client data in your Source dashboard, identifying ways to analyse data for your future advantage. By using this strategic hub, you stay informed about performance while revealing patterns in client behaviour, common objections, and purchasing preferences.

Reviewing this information consistently refines your approach to what you need. Whether you're looking to target clients early in their renewal period or adjusting your strategy to identify new sales opportunities, using facts and figures is an ideal way to improve your business.



Top tip:

Have you tried assigning a specific amount of time each month to review your dashboard? You can look for emerging patterns and trends, like common add-ons and client concerns. Use these insights to adjust your workflow, messaging and even your follow-up strategy for future business activity.

These small reviews can make a considerable difference in achieving your long-term GI goals.



STRENGTHEN

Bring it all together with the whole strategy: P.L.A.N.T., B.L.O.O.M., and R.O.O.T.S. Combined, these stages form an indestructible GI pipeline. Each stage of the GI journey plays a distinct role in your clients' experiences, as well as your business model. Laying strong foundations, growing your confidence, adapting your conversations and securing long-term relationships are all essential for thriving in the GI landscape.

When used together, P.L.A.N.T., B.L.O.O.M., and R.O.O.T.S. form a trifecta of cumulative methods that cultivate a flourishing GI garden, full of loyal clients, quality home insurance and steady income to supplement your primary earnings.

By embedding ancillary products such as home insurance into your business offering, you bring to the table a complete service that ring-fences clients, returning for your guidance year after year.



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