



5 tips for connecting with customers online

Making a connection with your customers is crucial to the success of your business, no matter what you're selling. It's one thing to do that in person—in a store, for example—and quite another to do online.

Having a winning product and excellent customer service will take you a long way, even on a so-so Web site. But today's Internet experts will tell you that's not enough. Connecting with customers online requires a different set of strategies that might not seem intuitive to the average small business.

Being aware of these connection-facilitating ideas can be as important to your company as the Internet itself. A 2007 survey by AMI-Partners found that more than 40 percent of U.S. small and midsize businesses are using Web 2.0 applications to connect with their customers through blogging, social networking, and other kinds of online interactivity. In other words, they're reaching out to their customers in new, innovative ways more than ever.

With that in mind, here are five strategies for establishing a long-lasting relationship with Internet users.

1. **By all means, tailor your content to the Internet.** Many small-business Web sites are little more than digitized brochures featuring rudimentary print-and-fax order forms. That's a mistake, says Lena Dmitrieva, a usability consultant at Bentley College near Boston. In order to connect with customers online, he says, you need to "provide users with the information that they need, rather than what you're trying to push in a way that makes sense to you."

What works? Write text that is easy to scan on the Web. "People don't usually read long paragraphs of text online. Instead, they tend to scan the text to see if it has anything of interest," Dmitrieva says. That means simple language, lots of bullet points, and order forms that actually take orders.

2. **Challenge customers with information that provokes a response.** Newt Barrett, founder of Bonita Springs, Fla.-based marketing consultant Succeeding Today and the co-author of an upcoming book about marketing through Web content, says actionable site content is critical to connecting with customers. "Compelling content generates highly qualified leads," he says. "Compelling online content begins an ongoing dialogue with your best buyers from the very first moment they land on your Web site."

What works? Contextually relevant content: anything from a chart depicting the growth in demand for a certain product to a short paragraph summarizing the benefits of a service. Barrett recalls one example of a custom publisher that launched a quarterly white-paper series. Most of the promotion was simple —just a short Web site blurb and a few ads. The papers were only about eight pages each, but the information was relevant and valuable to the user. And it sold well.

3. **Converse with your users on their terms.** In earlier days of the Internet, most communication with customers went one way. There were ads, direct

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Quotit Leads Program

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mailings, and e-mail newsletters that pushed content to a mass audience, mostly without an invitation for direct feedback. Now, with Web 2.0 applications such as blogs, wikis, and online forums, it is truly more of a dialogue. That's an opportunity to connect with customers, and it's one that your business shouldn't pass up, experts say. "A two-way conversation isn't one-dimensional," says Robb Hecht, a marketing consultant and adjunct marketing professor at City University of New York. "Online users today are feeling more engaged with brands, connected to and informed about new products and services based on the community-generating effect of these social networking tools."

***What works?** Creativity and passion for the customer, and a genuine interest in his or her point of view. These conversations are now happening in forum posts, wiki entries, and blog comments. Don't limit yourself. But remember: Each medium has its own rules of etiquette that must be understood.*

4. **Customize the experience.** One size doesn't fit all on the Web. People want to be able to interact with their sites in a way that they're comfortable with. "Customization is definitely underutilized by small businesses," says Marc Ohmann, president of Digital Solutions, an IT company based in Bloomington, Minn. Why? Because they don't think it's possible. But Ohmann begs to differ. His company has worked with small home builders that have used simple applications that allow visitors to create designs for customized homes when they're online.

***What works?** Start small. Formatting an e-mail newsletter to greet a subscriber by name is pretty easy these days. But plan to expand your site beyond that. Large sites such as Amazon.com have taken customization to new levels, creating lists of book titles or CDs that they predict you might enjoy.*

5. **Refresh your content periodically, test new approaches, and stay fresh and creative.** Web users aren't easily impressed, but that doesn't mean you shouldn't try. "More and more Web sites need to engage people and provide information in unique ways," says Brent Leary, a partner with CRM Essentials, a marketing consulting firm in Stockbridge, Ga.

***What works?** Anything that can be used to set your site apart from the crowd will help you connect with customers—and win their business. For example, one service, [SitePal](#), creates virtual characters that interact with your visitors, answering questions, and driving sales. The larger point, though, is that there are many applications that can give your site an edge, and many more that will be developed in the future. Be adventurous.*

You can connect with customers by listening to their needs, saying something worthwhile, and having a creative dialogue. But sometimes, leaving your site is the best way to hook up with them. Marketing consultant Shel Horowitz likes to visit other Web sites and blogs and post comments that draw readers back to his site. "But it has to be genuine commentary that helps to position me as an expert and get my sites noticed in search engines," says Horowitz, the author of "Grassroots Marketing: Getting Noticed in a Noisy World" (Chelsea Green, 2000). Which is to say, your site is a terrific place to find customers. But don't limit yourself.

***About the author** Christopher Elliott is an Orlando, Fla., writer and independent producer who specializes in technology, travel, and mobile computing. His work has appeared in numerous newspapers, magazines, and online. You can find out more about him on his Web site or sign up for his free weekly newsletter.*

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Welcome Mark Seghers

Introducing Mark Seghers as Senior Vice President of Business Development for the Quotit Corporation.

Mark has enjoyed a long career in the insurance industry and brings to Quotit over twenty years of experience and industry knowledge. For the last few years, Mark has served as a consultant to a number of insurance carriers, helping them develop and implement their technology strategies. Prior to his time as a consultant, Mark was the Vice President of business development for an insurance technology company. Before that he worked for Assurant Health and more recently at American Medical Security as a Vice President on both the sales and operational sides.



Mark has a background in technology, having served as IT director, project manager, and as a proposal software programmer. Mark holds a Bachelors of Science in Business Administration from University of Wisconsin - Milwaukee, and FLMI designation from the Life Office Management Association.

Now on board with Quotit as SVP of Business Development, Mark's role is to expand and extend Quotit's carrier relationships, business partners, and products. "Mark's experience helping insurance agents and carriers sell more using technology makes him a natural fit." says Chad Hogan, Quotit's Director of Operations.

In his first few weeks with Quotit, Mark said he has been struck by how welcoming the people have made him feel. Mark has also been very impressed by the Quotit team. "From company president David Smithson's unwavering leadership extending across the organization - to the focused rating people, to the customer service people, to the dedicated IT personnel, to the friendly, low-pressure sales representatives - everyone knows their jobs and works together effortlessly," said Mark.

"The feedback I get from the field, and from the high loyalty our customers have shown, I can tell our customers are extremely happy with our product. For those customers who have tried both Quotit and a competitor, Quotit wins hands-down. Technology is at the core of Quotit - we care very much about accuracy, ease of use and presentation. We were doing it first and we do it best." Says Mark.

In the coming weeks, as Mark learns more about Quotit and its people, processes and technology, he looks forward to talking with producers about:

- How they use Quotit?
- What they like best about Quotit?
- How can Quotit help them do more and sell more policies than they do today?
- What suggestions they have that may to help us improve Quotit's products?

"While I realize I may be opening a fire hose here, I welcome customers' telephone calls and emails." Mark can be reached by phone at 866-478-6848, extension 338 or via email - mark.seghers@quotit.com

Profiles of Success: Marty Ferguson

Quotit: Tell me a little about your agency and what insurance lines you market.

Ferguson: Our niche is really just the Individual Health Insurance market. We do

add some supplemental plans on the side, a little Medicare, some dental and a little bit of life insurance but our bread and butter is Individual Health Insurance.

Quotit: How has your agency changed the way you do business in the last few years?

“ You’ve saved us a lot of time. We are absolutely ecstatic that we found you guys... ”

Jason Ferguson
www.quotemymed.com

Ferguson: Up until about a year ago we had been primarily focused on using the yellow pages and building our existing referral network. We still use a little bit of yellow page advertising for those people who don’t have internet access, but really we have transformed that and are trying to improve our accessibility online and use that to our advantage.

Quotit: What types of traditional marketing did you use?

Ferguson: Aside from the Yellow Pages and referrals, we do some things with magazines here in the state of Utah specifically, in magazines that have a statewide reach. Really, we rely on our referral system which is great; we will send out gifts to any of our clients who refer us new business. This has always worked out pretty well for us.

Quotit: What expectations do you have when running a marketing campaign?

Ferguson: I have really focused on the development of the website and web marketing and so it is hard for me to say for sure. One of the things about Health Insurance is that it is a somewhat slower market and it can take a while to get started using any marketing method. For us, it is pretty easy as we have built the business from the ground up and have the client base to support the marketing.

Quotit: How did you provide proposals for customers?

Ferguson: We used to use a rate sheet that Marty put together about 10 years ago. We really focused on the top 13 or so plans and sometimes we would have to go to the rate book, manually find the correct plan, look up the rates for each person and then do the math. It could take ten minutes to complete a quote. Now it is just a few key strokes and even fewer seconds to get that same quote. Now it is instantaneous.

Quotit: What challenges did your agency face during this time?

Ferguson: Marty has been in business for about 25 years and started out walking strip malls and simply going from business to business, and quoting people. Really trying to build the business up from there. And he has been really successful. Moving online was the next step in really expanding the business.

Quotit: How has Quotit helped your agency?

Ferguson: Quotit has saved us a lot of time. Now when a customer calls us and wants to get a quote, I just tell them to go to our website and they can get that information there. This past year we have seen some pretty drastic rate increases with Blue Cross Blue Shield and many of our clients haven’t been very happy with that. We sent

“ With the Quotit technology, we are able to produce a quote that looks professional and it has given us an instant credibility. ”

Jason Ferguson
www.quotemymed.com

We sent out a form letter introducing our website and letting them know that they could go look for a better rate there. Many of our clients have been with us 6, 7, 8 or more years and didn’t even know that we had a web site. So we sent out a letter saying if you don’t like this new renewal with from Blue Cross, go ahead and go online at our website we do business with Humana, Select Health, and Altius. Go on line and check us out there. It saved us a lot of time. Rather than call each of our

customers one at a time and run a quote and see how much money they could save. We just hit them all at once. This is especially helpful now with a larger base of clients. We have been able to do some online advertising. Another huge benefit of the Quotit system has been with making us look a lot more professional. It used to be that if you wanted to send somebody a quote, you had put something together, put it in the mail and send it over. It was just our little sheet of white paper, but with the Quotit technology, we are able to produce a quote that looks really sharp and professional and it has given us an instant credibility for those people who don't know who we are.

Quotit: How did your agency's sales process change with this proposal system?

Ferguson: Before Marty would let me really take an active role in the business, he said I needed a degree so I went to BYU and got a degree in Accounting and decided before I go full on in to the business maybe I should go out and get a little experience. So I lived in California for a year and worked for one of the big accounting firms. When I came back to the business, I told Marty that what it was really going to take to turn the corner in growing the business was getting a website going. It was a perfect coincidence, the same day I started trying to figure out how to build a web site and do this quoting thing, Michael Foster called from Quotit. He told me about your software and we looked at a few websites and it was just awesome, not only did you help us with the software but Walter built us a really nice website. We are still in the process of making some changes and meeting our needs. It has been fantastic. It save me a lot of time, I'd probably still be working on it now a year later.

Quotit: What impact has been made by taking your business online and creating your agency's website?

Ferguson: It has really impacted our customer service. Now we can send out a letter to our customers that reminds them when a rate increase is coming to go to our website to check out what other rates are available for them. We also save a lot of time on our current customers. Another impact is that we get a lot more people that are answering their own questions and so we get to spend more time answering more detailed questions instead of explaining the whole process from the ground up. We are spending less time overall because the clients are better educated and are therefore asking better educated questions of us. I've found that lots of people are already using our site having found it on their own; it is really gratifying when people have found us without having to be directed there.

Quotit: What percentage of your business now comes from online?

Ferguson: Probably a third to a half of our new business is direct online business. The rest of our business is from referrals, but many of those are using the site to make that first contact and figure out what they are going to want before calling in to us. I'd say that more than half of our customers use the website.

Quotit: How does your agency manage visitors to your web site?

Ferguson: We direct many of our customers to our website, but we do get a fair number of applications that are submitted without the customer ever contacting us. We always do like to talk to our customers and let them know that we are here and that we are real people. If we get an online lead we try to call them within a day or two to let them know that not only are we an online health insurance site, but we are here to help them and get their questions answered.

Quotit: What biggest factor has made your agency more effective since working with Quotit?

Ferguson: Just the accessibility of the rates has made a huge difference for us. Having it all online and being able to direct someone to quotemymed.com, have them put in their ages and they've instantly got the rates at their fingertips and this can all happen if I'm in my office or driving down the road.

Quotit: What do you like to do in your spare time? (Now that you have all this free time)

Ferguson: We sell more insurance, make more money and golf. We only have three or four months out of the year to play. So we really take advantage of those opportunities. We love to play.

Quotit: Where do you see your agency heading in the next 5 years?

Ferguson: I see it just growing more and faster. I anticipate getting a stronger hold on the internet marketing and we really anticipate making it even easier to find us on line. The next five years will bring a significant increase in the speed with which we are growing. I would like to see us grow as much over the next five years as we might have over ten or fifteen years without the Quotit system.

Quotit: In your opinion, will online technology play with your agency's success in the future?

Ferguson: Yes, absolutely, make the website even easier to use. And continue to build up that we are an organization that is here for the long term. As I said earlier, Marty has been in business for 25 years, I've been in it for 7 and with the other guys in the office we have over 50 years of combined experience and it is good to know that we have not only the technology, but we have the experience to back that and really give people the best possible level of service. We really feel that we can give the best service in all aspects on someone looking for health insurance. We appreciate what you guys have done for us. You've saved us a lot of time. We are absolutely ecstatic that we found you guys, or you found us, it has worked out great and we look forward to it staying great and getting better.

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