AFFINITY NETWORKING FOR AGENTS

Guide to Affinity Partners: **Small Businesses**

Use this guide as you get started building affinity partnerships with small businesses. These include and are not limited to:

- Coffee Shops
- Restaurants
- Fitness Gyms
- Indoor or Outdoor Malls
- Grocery Stores
- Retail Stores
- Thrift Shops
- Craft or Hobby Stores

Before You Meet — Researching Your Partners

Your goal is to build affinity partnerships with select small businesses in your area that will benefit both sides!

Small businesses may be interested in:

- Increased word-of-mouth to draw in new customers
- Educational trainings to help increase foot traffic at their location
- Assistance with marketing costs — co-promoting your partnership
- Sponsorship of noninsurance events

Be Compliant!

Your interactions with affinity partners and their clients must always adhere to CMS and carrier rules and guidelines. Check with your carriers, CMS and your compliance officer before you start marketing.

Starting the Relationship — Making Yourself Known

Here are some ideas on starting your discussions with potential affinity partners:

- Choose a few businesses based on their overlapping client base and complementary offerings to your insurance services. Pick a day to make in-person visits.
- If you'd like, bring a small gift, treats or a branded item to leave with the staff.
- When you arrive, ask to speak with a manager or owner and introduce yourself as a local agent seeking a networking partnership.
- Bring your pitch deck — customized for this organization — and be ready to pitch if they have time now. If they can't, schedule a time in the coming days to talk.
- Be real, be friendly. When they can tell that you care about their audience and the local community, they'll be more open to listening!

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What Small Businesses Care About

As you talk with your potential affinity partner, really listen for any stuck points they have with reaching people, staying profitable or growing in the community — notice what's important to them. Here are examples you might hear, and how your partnership could help:

- Issues with getting more people into their store — holding a joint event can increase foot traffic and visibility
- Becoming a go-to resource for their specialty in the area — you can inform your clients about what your affinity partner offers the community
- Keeping customers coming back — offering recurring community events can give customers another reason to return

Building the Relationship: Ways to Remain Top of Mind

Once started, it's important to nurture your affinity partnerships. Here are just a few options about when and why to reach out:

- If planning an event, keep communication flowing, increasing in frequency as the event approaches
- Coordinate co-branded promotional materials monthly or quarterly — these can be as creative as you'd like and would include both partners' information, but might include pens or notebooks, reusable coffee mugs, or a seasonal newsletter
- Check in monthly as a touch-base to manage progress and make long-term partnership plans

Be a Great Affinity Partner — You've Got This!

As you build affinity partnerships, remember that you're doing great work. You are offering more of what your clients need while supporting your partner's audience with additional insurance options.

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