Create Touch Points with Technology
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Many agency owners lose sleep over the ability to attract and retain top talent and differentiate their agency from the competition. The solution to both improved customer experience and employee relations lies in effectively using technology. By embracing new digital strategies, agency owners can address these challenges, gain efficiencies in their agency, and finally get a peaceful night's rest.

Out-service and outsell

Agencies, at all levels, must prioritize and emphasize customer experience to remain relevant and distinguish themselves from priced-based sellers.

Technology, used wisely, can help agencies reach out in automated ways, create cost-effective touch points that accommodate clients' preferences, and streamline agency workflows and simplify processes for clients. Functions like download, e-docs and client portal systems are fantastic examples of maximizing technology to improve agency efficiency and client access. But, as processes are automated, we must be careful not to do away with the agent-client relationship.

Merely *increasing* the agency's use of technology won't provide the best service to clients. Yes, clients want the latest and greatest in innovation that saves their time, but they also want personalized service from someone they trust. If agency personnel aren't speaking to clients and fostering those relationships, clients will ultimately leave. *Leveraging* technology to free up time for human contact will reap benefits in profitability and growth.

Consider this: Your producers may be able to bring on more clients through improved digital services, but is your support staff able to service the increased load? Evaluate every step of every agency process and ask: "Is this necessary?" and "Does this add value for customers?" If the answers are no, stop. When a procedure is required but doesn't add value for the client, it is time to implement automation or outsourcing.

Once agency processes are streamlined, invest the saved time into strategies that improve the client experience. Conduct a client-experience audit and look at your agency from the perspective of a potential customer and an existing client. Ask yourself, "If I were a client, would I be getting the service I expect?" Always remember that the goal of any technology you employ is to differentiate your agency from the competition based on personalized relationship-based service. Incorporate digital strategies keeping customer experience top of mind, and in addition to improving efficiency, you will improve customer experience.

Using digital carrots to attract top talent

Today's top talent expects digital work processes in their jobs. That means automated workflows, paperless offices and on-demand information. These recruits are ambitious, thrive on instant gratification, and will inevitably shape the future of your agency's culture and the industry. Don't be the last to incorporate technology into your recruiting and employee-relations strategies or you'll risk

getting the leftovers from the applicant pool.

Incorporate technology at all stages in your employee-relations processes: recruiting, onboarding and retaining. Today's top talent is online, uses social media, lives everywhere and works anywhere.

Don't limit your recruiting efforts geographically. There are many functions within an agency that don't need to be completed within the confines of brick and mortar. In the future, we can expect more agency staff to work at least some of the time remotely. We already have agencies in our industry that are entirely virtual. They go directly to the client via the internet or mobile office. Use the best people however they come: part-time, outsourced. Even the indispensable employee who is moving away can stay on board! Advancements in online collaboration resources, virtual desktops and cloud software have made it possible to work anywhere.

Agencies that successfully recruit and retain top talent emphasize that our industry provides a long-term career environment with room for expanding a variety of skill sets: "If you like detail work, there's a place for you. If you like to sell, there's a place for you. If you like helping clients but not sales, there's a place for you, too. If you like to manage a business or tinker with digital systems, join us. There is always something new; you will never be bored." The best avenue for this enthusiasm is social media. You and your agency should be on Facebook, LinkedIn, Instagram, Twitter, whatever social media platform works for your agency. This includes making sure recruits know the importance of your agency's impact on the community. Emphasize this in your recruiting and marketing efforts.

Once you successfully recruit the best of the best, don't deflate their enthusiasm with mundane, archaic training and career-pathing methodology. Digital training resources help new employees learn at their own pace, find answers without disrupting other staff members, and track their own progress. Managers are able to spot strengths and weaknesses more quickly and provide better feedback. People are inherently good at what they love doing. Fuel their passion, give them resources to expand their abilities, and help them find new ways to improve client service. Even though our industry is trending toward the separation of functions (account managers, processing managers, processors, producers), agency personnel don't work in silos. Technology unifies the approach to processes and customer service by melding staff members into a team, where each person does a specific job in harmony with others. Your newest employees could be the key to revolutionizing teamwork in your agency.

Use tech to create time

If anything should keep agency owners awake at night, it should be pondering the future leadership of their agency. Whether an agency is being passed down to a family member or sold, current owners should be obsessed with maintaining profitability and an upward growth trajectory. How they spend their time and use digital tools will determine their agency's future success and profitability. The next generation of agency owners must be fearless toward change and technology but also must remember that the clients and employees of the future have the same desires: easy and fast access to information, and personal, exceptional service. The future success of agencies and our industry lies not in what technology will be available but how we will use *it* and *our time* to improve people's lives.