



# Top 5 Ways to Earn Referrals

(800) 689-2800  
SMSteam.net

## 1. Quarterly Newsletter

Depending on the study you read, sales people should have 5-7 “touches” every year with their clients. A quarterly email newsletter is a great way to keep in touch with your clients!

Some Content Ideas:

- Health Ideas
- CMS Materials
- Talking Medicare from Senior Marketing Specialists
- Uplifting News Stories
- Personal Note

Make your newsletter informational and not just another sales pitch.

## 2. Connect with clients over Facebook

Have your current clients “like” your Facebook page. Post interesting stories for them to share with their friends. Tag them in posts (with their permission) and thank them for taking the time to speak to you about their insurance.

Need help with content and ideas? [Join our agent Facebook group!](#)

### More than great service

Clients are expecting great service from their agent. It is about going above expectations and connecting more with your clients to keep you top of mind and viewed as a resource.



### 3. Give referrals

While most agents focus on their current client base for referrals, don't forget about professional partnerships. Create a reciprocal partnership to expand your services and earn referrals from others who serve the same population as you.

- P&C Agents
- Estate Planning Attorneys
- CPA's
- Financial Planners
- Senior Communities
- And others who serve the senior community

### 4. Let your clients know you appreciate referrals

If you are not asking your clients or informing your clients you appreciate referrals, they may not think to tell their family and friends about you. A simple sentence like, "A lot of clients come from their family and friends. If you have anyone that has questions about their Medicare or insurance, here are a few extra cards, or feel free to tag me in a Facebook post."



## 5. Try Rocket Referrals

Looking for a way to get your clients to talk about you? Want some “social proof”? Don’t know what social proof is? Check out Rocket Referrals to help get you referrals you can use!

[Rocketreferrals.com](http://Rocketreferrals.com)

### Bonus Tip:

After each appointment, mail your client a hand written thank you card. Even if the appointment is not a sale, the effort and personalization shows you take extra effort to take care of your clients.

Example:

*Thanks for meeting with me about your insurance needs. I hope you enjoy your vacation this summer to Florida. If you have any questions, please let me know.*

Simple, personal, and effective.



## Resources

### Senior Marketing Specialists Resources:

[SMSteam.net](http://SMSteam.net)

[SMS Quote Engine](#)

[SMS News Page](#) (Featuring *talking Medicare*)

[Facebook Group for Agents](#)

[Trainings and Events](#)

[Products Offered by SMS](#)

### Newsletter Services:

[Mailchimp.com](http://Mailchimp.com)

[Constant Contact](#)

### Referrals:

[Rocket Referrals](#)

### Medicare Cafe

Every Tuesday at 10:00am (CST) we feature the Medicare Café, a 15 minute overview of various topics and interests for senior market agents.

[JOIN US HERE](#)

*NOTE: Third party websites are not endorsed or sponsored by Senior Marketing Specialists.*





## How Senior Marketing Specialists can help:

- Industry leading support
- Top contracts
- Custom marketing materials
- Quote engine with underwriting and exclusive rate change report
- Live trainings
- And more...

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