



AFFINITY NETWORKING FOR AGENTS

Guide to Affinity Partners: **Community Organizations**

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

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| ✓ Libraries | ✓ Places of Worship |
| ✓ Senior Organizations (local chapters) | ✓ Rotary Clubs |
| ✓ Community Centers | ✓ Food Banks |
| ✓ Animal Shelters | ✓ Recreational Sports Leagues |

Before You Meet — Researching Your Partners

Your goal is to build affinity partnerships with select community organizations in your area that will benefit both of you!

What community organizations might need from an agent:

- Connections to new groups of people they might not otherwise reach
- Services that answer questions about health insurance
- Sponsorship of their 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 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 community, they'll be more open to listening!



What Community Organizations Care About

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

- Issues with costs to print materials like newsletters
- Becoming more visible in the community
- Wanting to offer more events but don't have time or budget

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 to exchange with your partner — 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.