



JAN PINNEY



RYAN PINNEY

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INTRODUCTION

WHEN WE ASK AGENTS WHAT THEY WANT MOST, THE ANSWER IS THE SAME: "MORE LEADS."

BUT MOST AGENTS DON'T REALIZE
THE MOST OVERLOOKED SOURCE OF LEADS
IS THEIR OWN BOOK OF BUSINESS.

From policy reviews to cross-sells, your existing clients are your best bet for new business. They know you, they trust you, and chances are they'll listen when you approach them with a new product or service. Of course, that product or service needs to be a fit for their life stage and financial situation. You also need to track which ideas you've already pitched to a client.

This is no time to be shuffling through Excel spreadsheets or outdated contact lists.

We encourage our partners and clients to use a CRM (customer relationship management) system to organize data and streamline their marketing efforts. CRM systems allow you to store policy data, documents, notes, tags, and other essential components of 21st century marketing. Our CRM of choice, <u>Insureio</u>, pairs robust automated marketing with advanced client, policy, and agency management features.

But in order to use a CRM like Insureio, you need to have a consolidated and complete list of clients, contacts, and policy data to upload into the system. What if you don't have that data? This guide will show you how to export data from Outlook, Gmail, Facebook, LinkedIn, carriers, and BGAs.

GATHERING YOUR BOOK OF BUSINESS IS THE FIRST STEP IN USING MARKETING AUTOMATION TO MAXIMIZE THE VALUE OF EVERY CLIENT OVER THE LIFETIME OF YOUR RELATIONSHIP.

CONTENTS

1: EXPORT CONTACTS FROM OUTLOOK & GMAIL

You probably have client and prospect data saved in your email provider's address book. We'll tackle the two most popular email providers, Outlook and Gmail. In both examples, we'll show you how to export contacts to a CSV file (the most common file type used to upload data into your CRM).

2: EXPORT CONTACTS FROM FACEBOOK

Facebook offers an easy way to export profile data - this includes not only your friends, but your photos, videos, and the text of your posts. We'll show you how to download your Facebook archive, as well as what's available in terms of exporting data from your Facebook business page.

3: EXPORT CONTACTS FROM LINKEDIN

LinkedIn allows you to export a CSV file containing your first-degree connections, their email addresses, current employer, and current job title. We'll show you how to extract that data from your archive, as well as explore the difference between "connections" and "contacts."

4: EXPORT CLIENT DATA FROM CARRIERS & BGAs

There are two different ways to request data from a carrier - we'll go over both, as well as explain the benefits and drawbacks of going through a carrier versus a BGA. This chapter also contains a template you can use to format your request when you're ready to send.

ONE:
HOW TO EXPORT
CONTACTS FROM
OUTLOOK & GMAIL



HOW TO EXPORT CONTACTS FROM OUTLOOK & GMAIL

If you're like many agents, your book of business is scattered across several locations: your email and social media contacts, as well as the apps you've submitted to carriers or BGAs. We'll show you how to export your contacts from each, so you can put them all together in one location. Whether you plan on using a CRM or not, it's a good idea to create this master list as a backup.

In this post, we'll start with email. You probably have a number of clients and prospects saved as contacts through your email provider. We'll tackle the two most popular email providers, Outlook and Gmail. In both examples, we'll show you how to export contacts to a CSV file (the most common file type used to upload data into your CRM).

Let's get started!

JUMP TO A SECTION:

Export Contacts from Outlook

Export Contacts from Gmail

Clean Up Contacts in Excel

EXPORT CONTACTS FROM OUTLOOK

These steps work for Outlook 2016 & 2013. Not sure which version you have? Here's how to find out and here's where to get directions for:

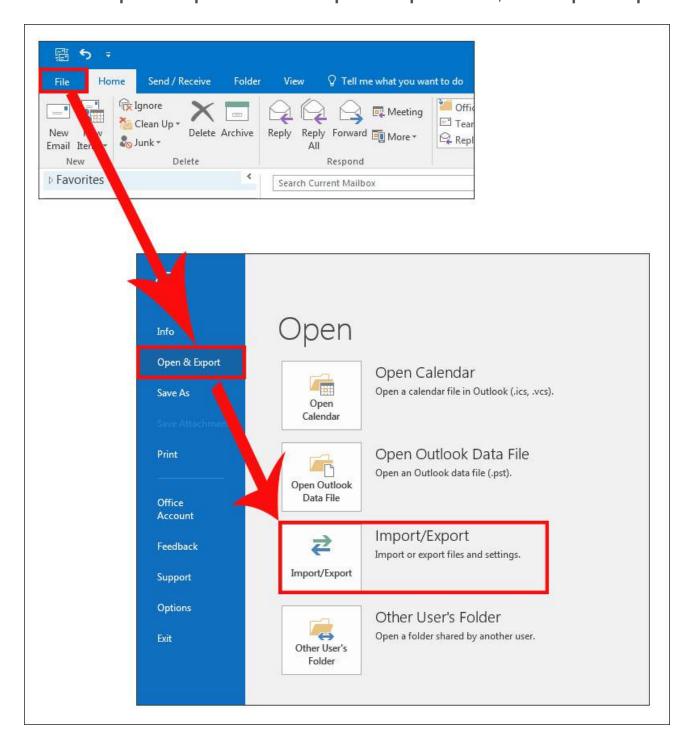
Office 365

2010

2007

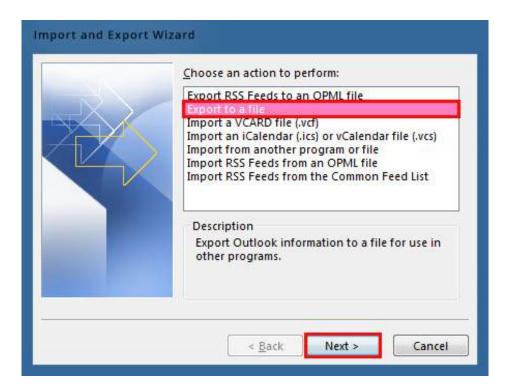


Click File / Open & Export. From the Open & Export menu, click Import/Export.

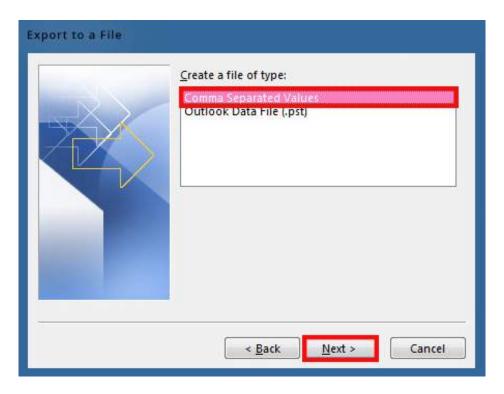




Choose Export to a file and click Next.

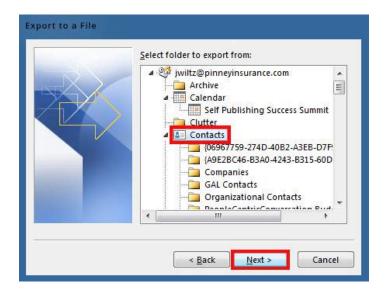


Choose Comma Separated Values (also known as "CSV") and click Next.

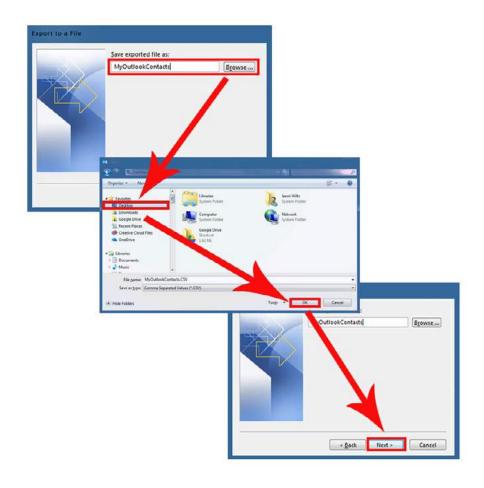




Select your **Contacts** folder and click **Next**. You may need to scroll up to see it.



Name your file of exported contacts. Click **Browse** and choose a location to save your file. Click **OK** and then **Next**.

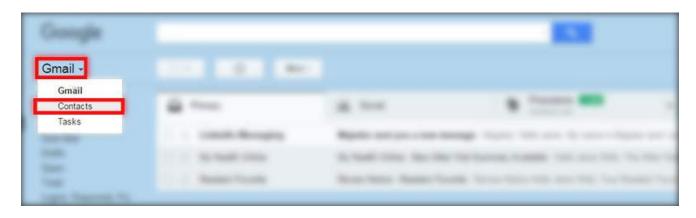




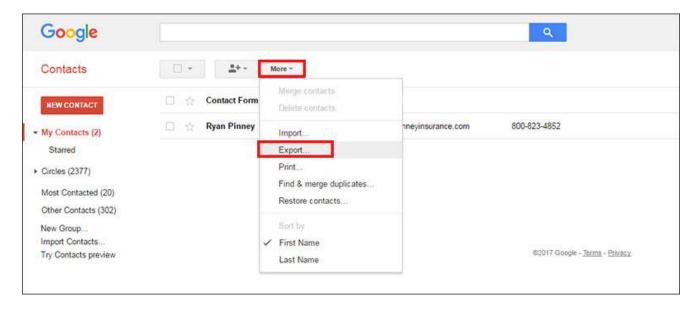
Click **Finish**. Outlook will export your contacts into a CSV file, saved in the location you specified. That's all there is to it!

EXPORT CONTACTS FROM GMAIL

In Gmail, click **Gmail** in the top-left corner and choose **Contacts**.



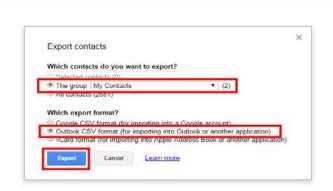
On the Google Contacts page, click **More** and select **Export**.



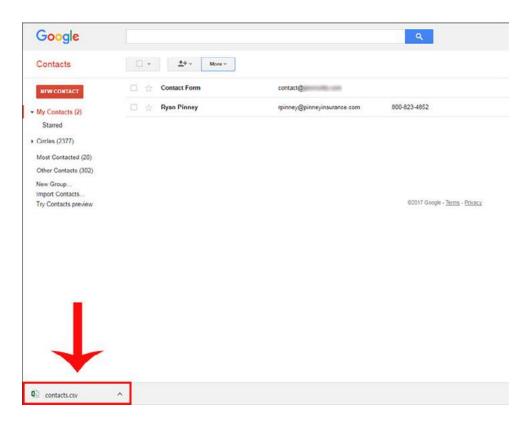


In the export dialog box, be sure you:

- •Select the group **My Contacts** if you don't, the default is currently set to include anyone in your Google+ circles.
- •Select Outlook CSV format if you don't, the default is set to a Google CSV.
- Click Export



Your CSV file will download in your browser.



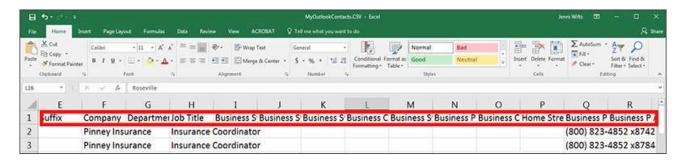


CLEAN UP CONTACTS IN EXCEL

When the export is complete, find and open the Excel file that Outlook and/or Gmail created. You'll probably see a lot of blank columns. These are data fields that Outlook and Gmail contain by default, but that you probably didn't use when storing info about your clients. If you exported your contacts purely as a backup, you can keep these columns. If you're going to import this data into a CRM, it's best to delete them to avoid unnecessary confusion or upload issues later.

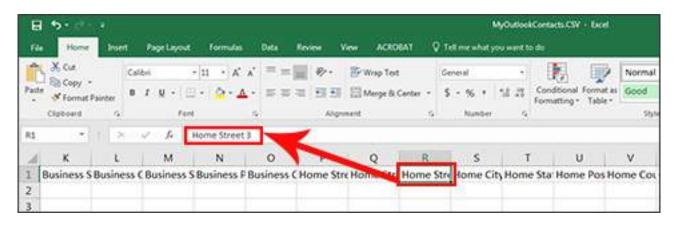
VIEW HIDDEN OR PARTIALLY HIDDEN DATA

As you're looking at your exported Excel file, you may notice you can't always see the full text contained in a cell, like these column headings:



You have two options:

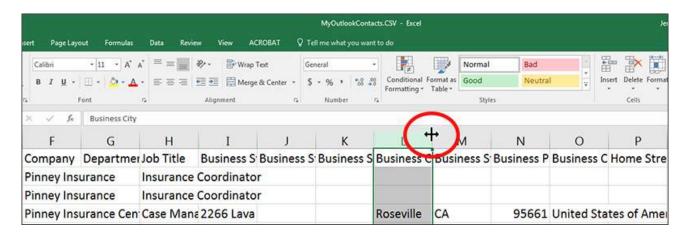
• Click any cell with partially hidden text. Excel will display the full text in the text field (shown in red in the image below).



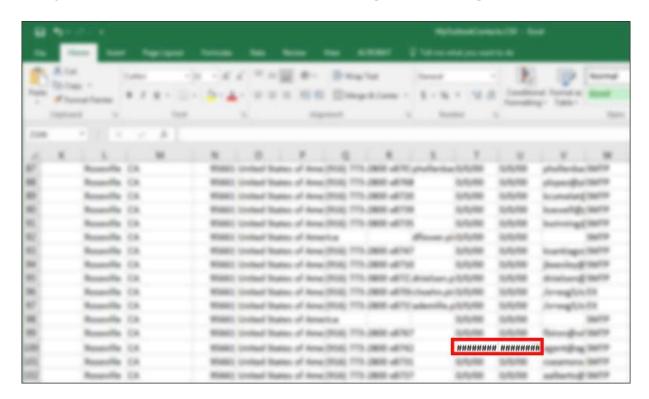
OR



•Hover your mouse on the right-hand border of the column letter. Double-click. The column will automatically expand to fit the data.

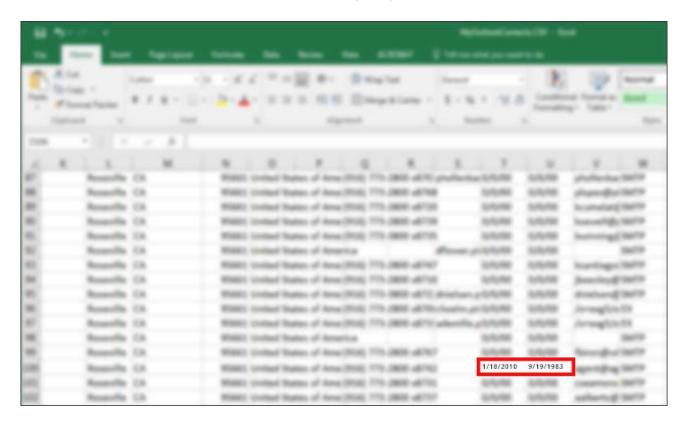


You may also see columns that contain nothing but hashtags (#):





This means the column isn't wide enough to display the stored numeric data properly. Hover your mouse on the right-hand border of the column header and double-click. The column will automatically expand to fit the data.



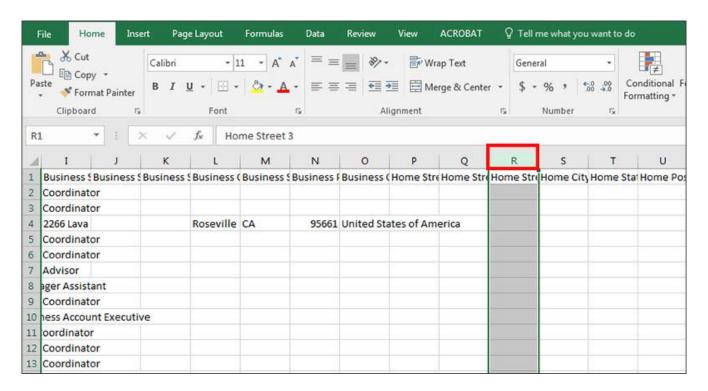
DELETE UNNECESSARY OR BLANK COLUMNS

Next, scan your column headings and determine whether you want to keep that column and its data. For example, Gmail automatically exports a column for a pager number. Outlook automatically exports a column for a fax number. Chances are you won't need or want to import this data into a CRM. You'll need to decide on a column-by-column basis what information you want to keep in your spreadsheet and transfer into your CRM. At a minimum, we suggest keeping name, email address, phone number, and company.

Before you delete a column, scroll down the length of your spreadsheet to make sure you're not deleting anything valuable. If all of your contacts have no birthday listed, for example, you can delete the column. But if you scroll down and find that several of your contacts have this noted, why not keep it? If an entire column is blank or contains information you know you won't need, it's safe to delete.



To delete a column, click the column letter ("R," in the example below). Right click and choose **Delete**.



When you've deleted all the columns with no exported data, click **File / Save** and close the file. You now have a CSV backup of all your Outlook and Gmail contacts!

TWO:
HOW TO EXPORT
CONTACTS FROM
FACEBOOK



HOW TO EXPORT CONTACTS FROM FACEBOOK

In this chapter, we'll show you how to export contacts from Facebook, including your profile and your business page. A lot of people get confused about the difference between a "profile" and a "page." Every Facebook user starts with a profile - that's the "wall" your friends post on to wish you a happy birthday. Once you have a profile, you can create a page for your business. Your page is what gathers "likes" rather than connections with friends.

JUMP TO A SECTION:

Your Profile: Export Facebook Friends

Your Business Page: Export a List of People Who Like Your Page

Facebook Contacts: Look up Missing Email Addresses

YOUR PROFILE: EXPORT FACEBOOK FRIENDS

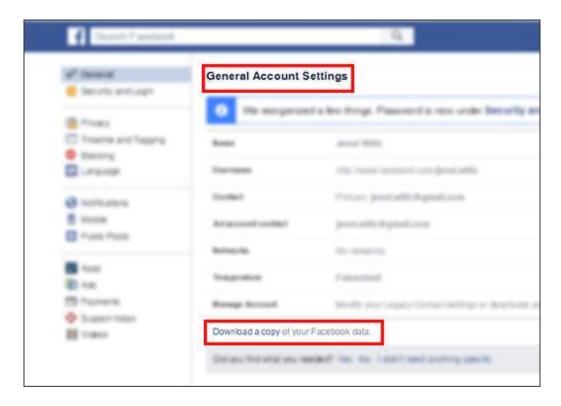
First, log into your Facebook account. Click the arrow in your top menu and choose **Settings**.



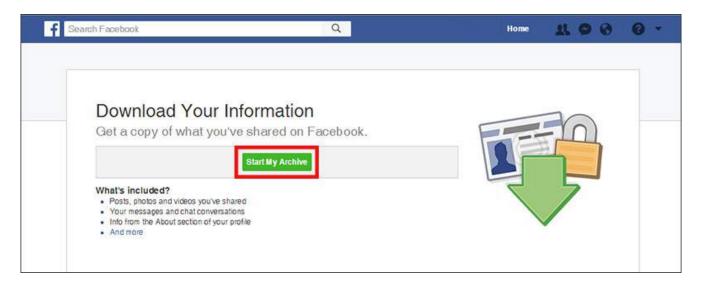
From the General Account Settings page, click **Download a copy of your Facebook data**. Facebook will provide a zip file that contains your friend list,



the content of your posts, your stored ad preferences, uploaded videos, and more. Here's a complete list of the data Facebook will include.

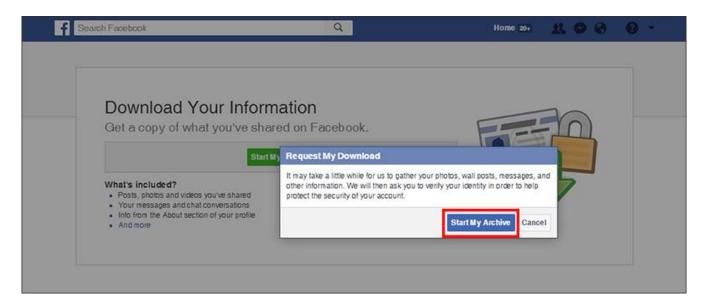


From the Download Your Information screen, click **Start My Archive**. Facebook will then prompt you to re-enter your password.

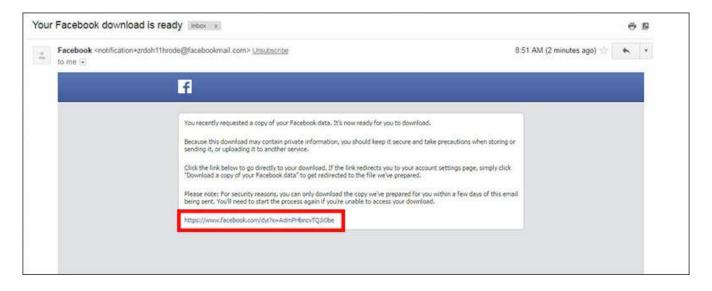




Next, Facebook will ask you to verify that you want to start your archive. Click **Start My Archive**. Facebook will send a message to the primary email address on your account when the download is ready.

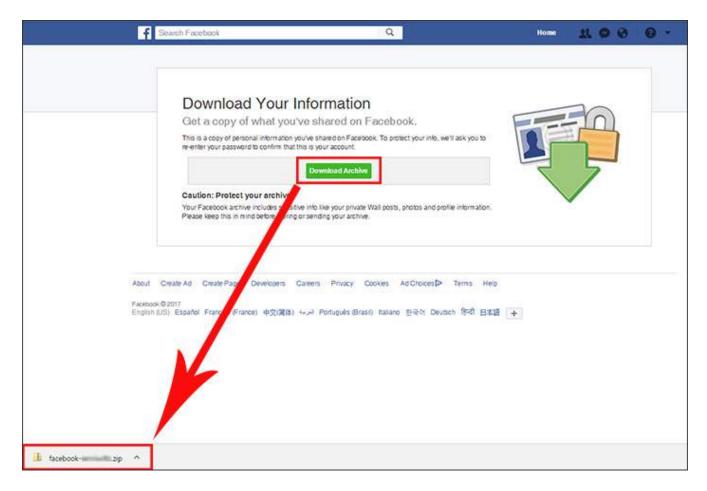


Now it's time to check your email. Depending on the size of your archive, it may take a few minutes to generate. Ours took less than 5 minutes. Click the link provided in Facebook's email, which will take you back to Facebook.





On the Download Your Information screen, click the green **Download Archive** button and re-enter your password when prompted to begin your download. Look for a zip file titled "facebook-yourname.zip" in the corner of your browser. You can also find it in your Downloads folder.



EXTRACT DATA FROM YOUR ARCHIVE

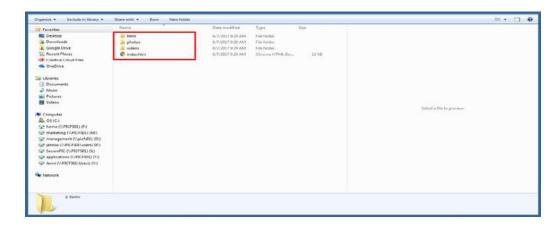
Now, let's get your friends (contacts) out of that zip file.

Your browser may let you open it with one click. If you're retrieving it from your Downloads folder, right-click the folder and select **Extract All**.

Once it's extracted, you'll see three folders and an index.htm file. Your contacts are in the html folder.



Here's what that folder group looks like:



Double-click to open the **html** folder. Look for the file named **friends.htm**. Double-click this file to open it in a web browser - you'll see your complete friend list. If a friend's security settings allow their email address to be shared, you'll have that, too. Be prepared for many of the email fields to be blank. We'll show you how to look these up below, but you may also need to cross-reference these contacts with other sources (such as your email provider or the apps submitted to carriers or BGAs) to get their email addresses.

Here's what it looks like when a friend allows Facebook to share their email address:





Now our goal is to get this list of contacts into an Excel file. From there, you can cut and paste the email addresses into a separate column and back-fill any missing addresses. If you started an Excel file based on the advice in our first chapter, add these names to that spreadsheet instead of starting a second one.

There are two ways to get the .htm file's content into Excel. Choose the method that works best for you:

- Rename the "friends.htm" file as "friends.xls" and open in Excel. Reformat, copy, and paste as needed.
- Double-click the .htm file to open in a browser. Copy and paste the list of names and email addresses into a new blank Excel workbook. Reformat, copy, and paste into your master spreadsheet.

YOUR BUSINESS PAGE: EXPORT A LIST OF PEOPLE WHO LIKE YOUR PAGE

Facebook can show you a list of people who like your business's page – if, that is, those people allow Facebook to display this information about them.

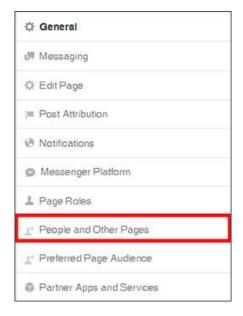
There's no easy way to "export" this data, unfortunately. We'll have to do it with some good old-fashioned cutting and pasting.

At the top of your Facebook page (not your personal profile), click **Settings**.

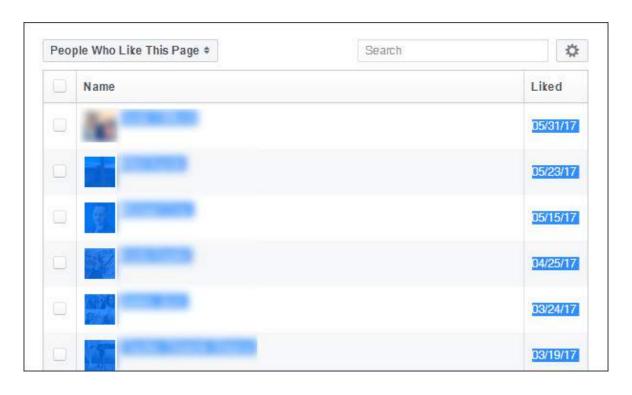




From the left-hand column of options, click People and Other Pages.

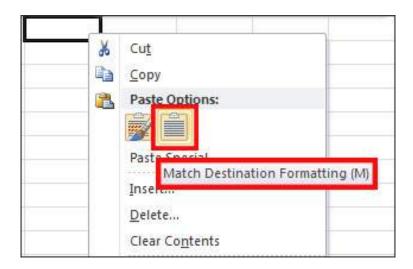


You'll see a list of the people who like your page – and who allow Facebook to display that data. The bad news? There's no export button, so we're going to copy and paste into Excel. Put your cursor above the first name in your list. Hold down your mouse button and drag to the bottom of the list, highlighting each person's profile photo, name, and liked date. Don't worry – we'll delete unneeded info later.

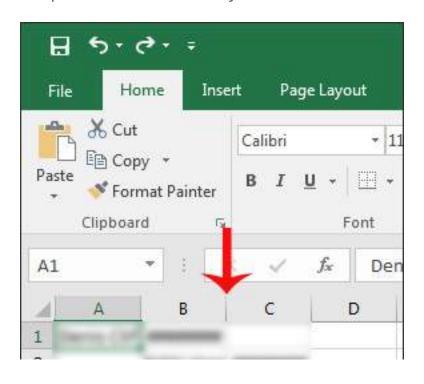




With these selections highlighted, right-click and select **Copy** or use the keyboard shortcut ctrl + v. Open a new blank Excel workbook. Click in the first cell (A1), and right click. Look for the **Paste Options**. Click the clipboard with blue lines (**Match Destination Formatting**). This will make sure only text is pasted, leaving behind the profile photos and formatting from Facebook.



Next, let's reformat the data before transferring it to our master Excel contact list. Widen the columns to make sure you can see all the data. Double-click the right-hand border of a column's heading to expand it. In our case, we're going to delete the date a contact liked our page. Once the data is formatted to your satisfaction, cut and paste the names into your master Excel contact list.





FACEBOOK CONTACTS: LOOK UP MISSING EMAIL ADDRESSES

Quite a few of the names you've gathered from Facebook are probably missing email addresses. You can try looking up their email addresses inside Facebook. If they've chosen to share their address, you can copy and paste it into your spreadsheet.

A NOTE ON COMPLIANCE

Keep in mind that just because someone is your Facebook friend doesn't mean they want any marketing from you. They have not opted into your email list, and sending them a marketing email may violate the CAN-SPAM Act. If you're including the email address for filing purposes only (and not for marketing), you'll be fine.

If you're able to gather an email and do want to use it for marketing purposes, we recommend sending them a quick note via Facebook messenger first. Remind them how they know you, and ask if they'd like to stay updated through your mailing list. The message only needs to be a few sentences long – feel free to use the sample below:

Hi! We've been Facebook friends for awhile now, and I'm reaching out to ask if you're interested in joining my mailing list. A lot of my friends and clients ask me for insurance and financial advice, so I'm answering questions and giving that advice via email. Can I include you?

If they reply and say yes, that counts as an opt-in, and you can safely add them to your mailing list.



SEARCH FOR EMAIL ADDRESSES

To search for any Facebook user's email address, go to their profile and click the **About** tab. If they've listed an email or phone number, it will be here:



That's how to export contacts from Facebook!

THREE:
HOW TO EXPORT
CONTACTS FROM
LINKEDIN



HOW TO EXPORT CONTACTS FROM LINKEDIN

LinkedIn allows you to export a CSV file containing your first-degree connections, their email addresses, current employer, and current job title. We'll show you how to extract that data from your archive, as well as explore the difference between "connections" and "contacts."

JUMP TO A SECTION:

Export Connections & Contacts

Download and Extract Your Archive

What's the Difference between Connections and Contacts?

EXPORT CONNECTIONS & CONTACTS

To get started, click My Network at the top of your LinkedIn home page.



Click **See all** beneath the number of your connections.

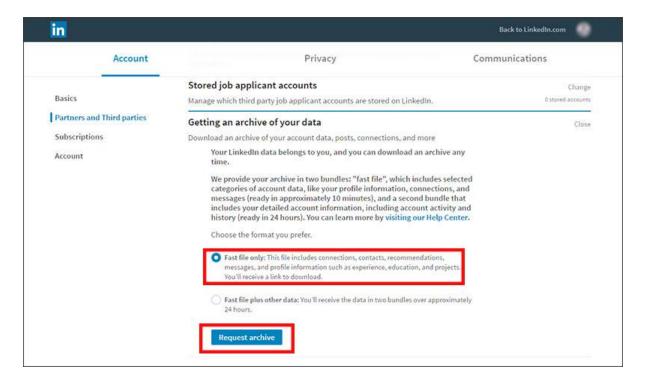




Click Manage synced and imported contacts.



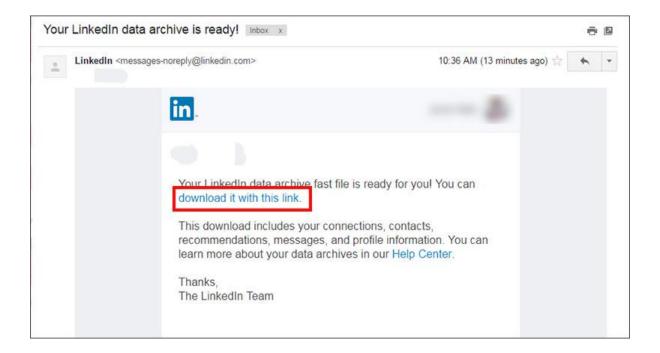
You'll be taken to a new screen with your member data and privacy settings. In the **Getting an archive of your data** section, choose between a "Fast file only" or a "Fast file plus other data." A Fast file includes your profile information, connections, and messages. As its name suggests, it's faster to get ready than your complete archive, including your account activity and history – this larger file will take up to 24 hours. Since all we want is the connection data for the purposes of this post, choose **Fast file only** and click **Request archive**.



LinkedIn will ask you to re-enter your password to confirm your identity. Once you do, you'll see a message that says, "We're preparing your data for download. You'll receive an email from us with a link."

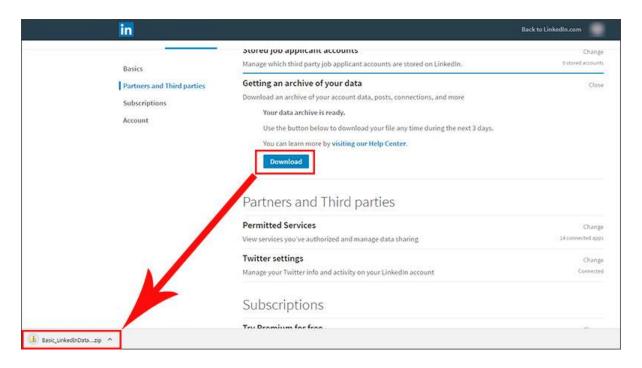
Now, it's time to check your email. When you get an email from LinkedIn, open it and click the link inside. It will take you back to LinkedIn.





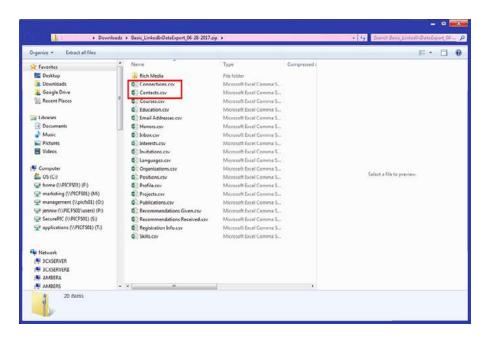
DOWNLOAD AND EXTRACT YOUR ARCHIVE

This page should look familiar – it's where you requested your archive a few steps ago. Click Download. The resulting zip file should appear in the lower-left hand corner of your browser. You can also find it in your Downloads folder.

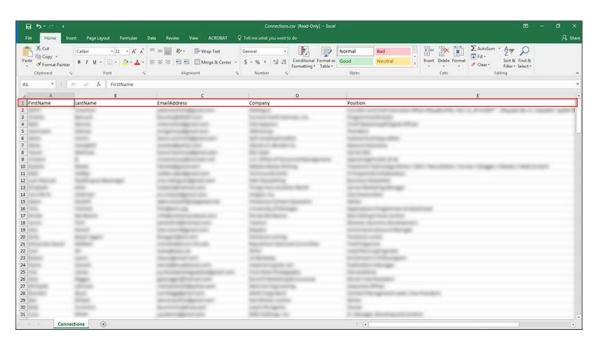




Open the zip file. Your browser may let you open it with one click. If you're retrieving it from your Downloads folder, you'll need to right-click and Extract All to unzip the file. Inside, you'll see a list of CSV files – we're interested in the ones titled Connections and Contacts. Open the **Connections.csv** file.



This file contains your first-degree connections – name, email, company name, job title, the date you connected, and any tags you applied to that person. To expand a column and better view its contents, double-click the column header (A, B, C, etc.).





If you already have a master Excel spreadsheet with your book of business, cut and paste these names into that one – you're good to go!

As we mentioned in our post on exporting Facebook contacts, if you plan to use the email addresses you got for marketing purposes, you need their opt-in first. You can use LinkedIn's messaging feature to send a message to your contacts, using a variation on the template we shared in the Facebook post:

Hi! We've been connected on LinkedIn for awhile now, and I'm reaching out to ask if you're interested in joining my mailing list. A lot of my friends and clients ask me for insurance and financial advice, so I'm answering questions and giving that advice via email. Can I include you?

WHAT'S THE DIFFERENCE BETWEEN CONNECTIONS AND CONTACTS?

Connections are people who have accepted your invitation to connect (or people whose invitations you accepted).

Contacts have a wider scope. They include everyone who has messaged you and everyone you have messaged. If you sent an invitation to someone but they didn't accept or are still pending, they'll appear in your contacts list.

Your contacts list also includes synced or imported contacts. When you first signed up for an account, LinkedIn probably asked if you wanted them to go through your list of email contacts to see which of them were on LinkedIn. If you said yes, every entry in your address book is also a contact. That's why you'll probably see a lot of email addresses with no names in your Contacts.csv file – these are people you emailed, but who don't use that particular email address on LinkedIn (or they don't have a LinkedIn account at all).

FOUR:
HOW TO REQUEST
CLIENT DATA FROM
CARRIERS & BGAs



HOW TO REQUEST CLIENT DATA FROM CARRIERS & BGAs

There are two different ways to request your data from a carrier - we'll go over both, as well as explain the benefits and drawbacks of requesting information from carriers versus a BGA. This chapter also contains a template you can use to format your request when you're ready to send.

JUMP TO A SECTION:

Request Client Data from Carriers

Request Client Data from BGAs

Considerations

REQUEST CLIENT DATA FROM CARRIERS

There are two ways to request your client data from a carrier. We'll go over both below.

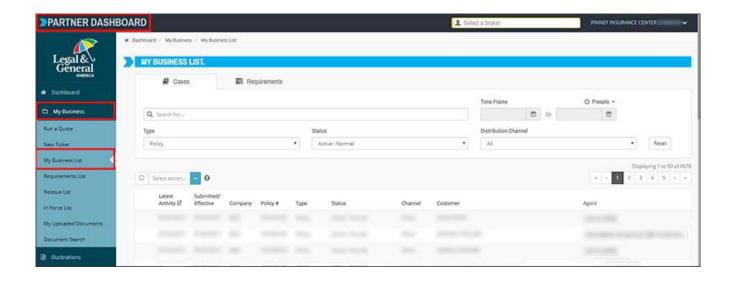
METHOD 1: AGENT PORTAL

Depending on the carrier(s) you work with, you may be able to access your book of business through their carrier-specific agent portal. If the portal offers this option, you'll be able to download an in-force book of business as a CSV or Excel file.

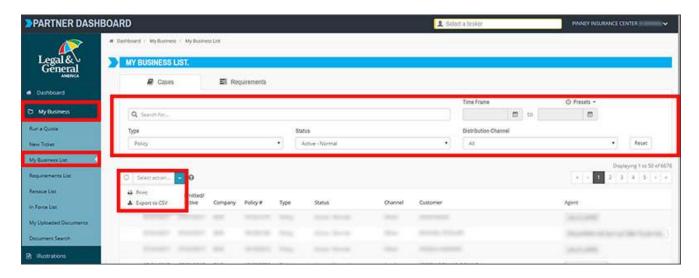
In the image on the next page, check out what we see when we log into our L&G Partner Dashboard. We can use the search criteria to display only in-force policies.

This is one of the benefits of retrieving client data from the carrier – they know which policies are in force. You can limit your download to information on clients who are still paying premiums.





If a carrier's portal allows you to view and sort data, you can probably also export it. In this specific dashboard, the option is a simple checkbox below the search parameters, as shown below. To download our data, we'd narrow search criteria to active clients and select **Export to CSV**.



Once you have your CSV, you can combine that data with the data you've already exported from your email and social media.



METHOD 2: MANUAL REQUEST

Other carriers require that you request your data through the policy owner service area or the sales desk/marketing department. If this is the case, you may need to send a letter or email requesting the data.

First, make a phone call to confirm where you should send your letter and to whom it should be addressed. Also ask what you should include in your request (i.e., writing agent name and/or code number).

Next, compose your letter. Remember, a carrier may be concerned that you're going to market to these clients and potentially persuade them to switch carriers. It's a good idea to mention your reason for the request, whether it's to consolidate your client data in preparation for taking on a new partner, selling your business, or to review whether the client's coverage is sufficient for their current financial situation.

SAMPLE REQUEST LETTER:

To Whom It May Concern, (<-- replace with name of actual contact)

I'm requesting a list of all my current in force policies that reached in force status during the following date range: (month, year) through (month, year). These policies have (agent name) as the 100% writing agent with the agent code (insert your code).

I want to confirm that I have the most up-to-date contact information for these clients while I review whether the policy amount applied is enough for their current financial situation.

Thanks in advance for your help!

Sincerely,

Your Name

Finally, email or print your letter on company letterhead and send it to the appropriate address.

Keep in mind that it can take weeks or even months to receive your data. You may need to follow up multiple times to remind the carrier about your request.

The data you receive will likely contain a client's name, policy information, address, and current beneficiaries. You may not get their email address(es) or current phone number(s). Plus, each carrier may provide your data in a different



format, which can make the process of consolidating it more difficult.

For all these reasons, if you can't do a direct download from your carrier's agent portal, it may be easier to request the information from your BGA.

REQUEST CLIENT DATA FROM BGAs

Most BGAs use one of several common agency management systems to process your business, such as iPipeline's Agency Integrator or Ebix's SmartOffice. These systems have robust reporting capabilities that make it easy and efficient for your BGA to provide you with a list of all clients, applicants, and policies that you submitted through them.

Some BGAs may have a policy not to offer this information or they may decide on a case-by-case basis, depending on your relationship. We find those to be few and far between.

In most cases, the more recently you've worked with them, the more likely they are to provide the data for you. Most agents work with 2-3 BGAs at a time over the course of a year. Agents who've been in the business for a long time may have 8-10 BGAs they've worked with.

TIPS & WHAT TO EXPECT

If you run into a roadblock, one way to entice your BGA to provide the data is to let them know there may be something in it for them. For example, if you're going to use your data to run a marketing campaign, your BGA could benefit when you send extra business their way.

One downside of requesting data from a BGA is the potential lack of recent updates. You won't get information on changes the consumer made since the policy went in force. However, one clear advantage is that you'll almost always get consumer contact information (phone number and email at the time the app was submitted), while carriers will rarely provide this.

As with a carrier, make a phone call first. Ask whether your BGA can get you the information you need. If so, find out what they need from you to run the necessary report. In most cases, your request can probably be emailed. If not, print out a request letter on your agency letterhead.



SAMPLE REQUEST LETTER:

To Whom It May Concern, (<-- replace with name of actual contact)

I'm requesting a list of all in-force policies your agency has processed on my behalf.

I plan on running a marketing campaign and want to be sure I have the most up-to-date contact information for these clients.

Thanks in advance for your help!

Sincerely,

Your Name

CONSIDERATIONS

Before you send your request, keep in mind that carriers and BGAs aren't required to provide you with your client data. They may tell you they can't provide it due to client privacy considerations and/or HIPAA compliance. Still, it never hurts to ask.

If you do get the data, one way to validate and update it is through a data-appending service. These services will provide updated contact information, social media accounts, demographic info, and more. It usually costs \$1 - \$2 per contact name, depending on how much data you want them to find. It's significantly cheaper to add just a phone number or email address. Services that append phone numbers should also scrub your list against the Do-Not-Call registry. Depending on how much data you started with, this may be the best way to prepare your book of business for future marketing efforts.



PINNEY I N S U R A N C E

THANK YOU FOR READING!

Now that you have a consolidated book of business, we recommend using a CRM to manage and store that data. Our CRM of choice is Insureio. <u>Learn more about Insureio here</u> and claim your free trial!