## Leveraging CompanyCam to Win Insurance Agent Referrals

"Referrals from insurance agents are one of the easiest ways to grow your business." - Matt Danskin



#### **HOW EASY CAN IT BE?**

Getting new customers is a lot of work. You're posting to social media, playing phone tag, and driving all over town to bid on projects, all in addition to doing the actual work you're hired to do.

Even if you're the best contractor in your area, you're still relying on a ton of pieces to fall into place to land new business. Luckily you've downloaded this pdf to learn about a simpler way: referrals.

# What is a Referral?

In short, a referral is an opportunity to work with a new customer facilitated by someone that the customer already knows and trusts. In the restoration business, these can come from an insurance agent.

## Why Referrals Matter

Referrals from insurance agents are one of the easiest ways to grow your business. These leads close at higher rates and can be more profitable than other customer acquisition methods because trust is transferred from the agent to you.

Another plus of these partnerships is how quickly they scale. Your team gets to spend more productive time on site doing what they do best while the agent keeps a steady stream of leads coming your way. You can spend that extra time finding which insurance agents/carriers are the best to work with.

# Getting Started with Referrals

Building referral relationships from scratch can be challenging for a couple of reasons:

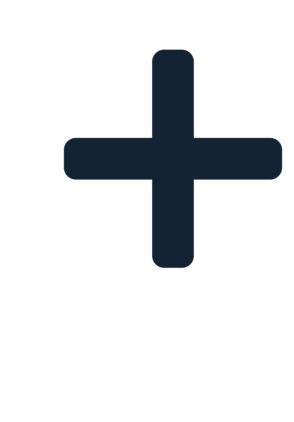
1. It's difficult for insurance agents to "sell" what sets your restoration business apart from others because they haven't seen much of your work. You and the agent are building trust between one another, which can be a slow process.

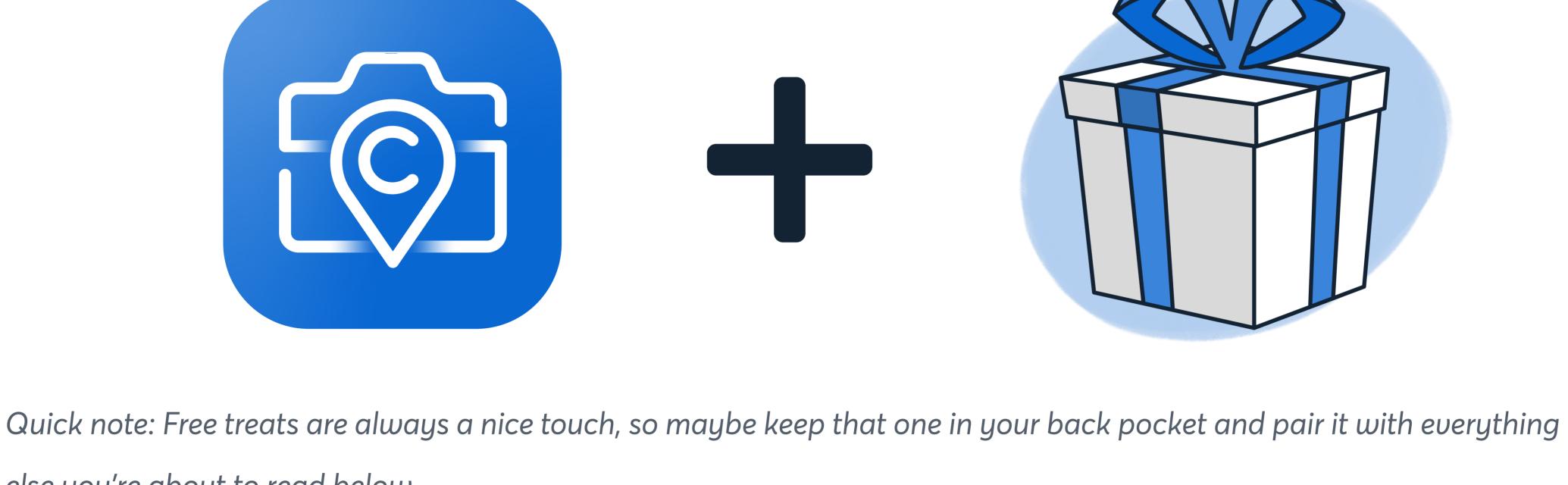
2. You could build those relationships the traditional way, i.e., visit an insurance agent's office with treats, tell them how

great you are, and follow up with a call and hope they send you some leads and so on. OR you could cut out a lot of that using an app you're already using every day...



else you're about to read below.





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The address

Existing damage

## CompanyCam, the photo documentation app for contractors, bridges the gap between showing the quality of your work

feature allows you to create a templated list of tasks and

must-have photos you need for each project. Making this list

capture and lay the groundwork for transparency throughout a project.

**Build Trust with Referral Partners** 

and earning an agent's trust and referrals. Referral partners, especially insurance agents, have key things they look for in their relationships. Among the most important

these areas.

are consistent processes, communication, and integrity. Here are ways you can use CompanyCam to build value in each of

### The first step to building trust with partners is to create a quality, consistent process. It's not enough to take a handful of

CONSISTENCY

photos of your inspections and work. Documentation should be done thoroughly and consistently, to be useful at "selling" the agent on your integrity and quality. 3:08 ₽ ııl **≎** 🕞 To-do Lists are a great place to start. This new CompanyCam **During the estimate** 0 / 5 tasks completed

P Street Roof

800 P St • Lincoln, NE 68508

17 Photos • 2 Documents

Dumpster location Photos (17) Docs (2) might seem like small potatoes, but it shows the agent that AC units and other equipment attached to building you are thorough and less likely to let things slip through the Storm damage near building (Insurance claims) cracks. + Add Task Takeaway: Successful restoration companies define an approach that works well for themselves (and their partners) and apply it to every project they take on. CompanyCam To-do Lists takes the guesswork out of which photos to

COMMUNICATION The second way to develop your referral relationships is to stay in regular communication. As you already know, there are many ways to use CompanyCam to keep everyone informed.

# The first (and probably the reason you're using CompanyCam in the first place) is by sharing photos. As you're developing

these referral relationships, this will be the best way to highlight the quality and progression of your work. Try using these features:

highlighting one aspect of your process. With the gallery tool in CompanyCam, you can select particular Thursday, July 19th, 2018

project gallery. Reports are an easy way to create and share job site reports in great detail—including project location, who

of all, these can be generated quickly from the mobile

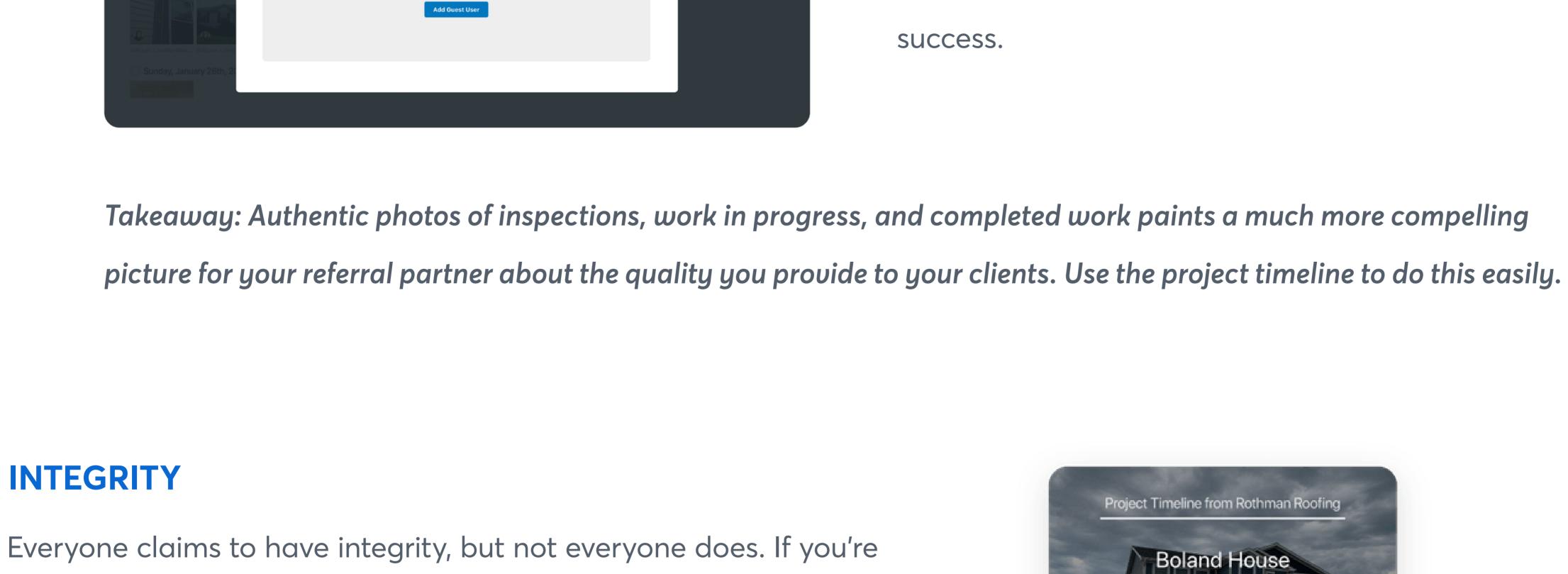
app. So, if you're sending insurance and warranty

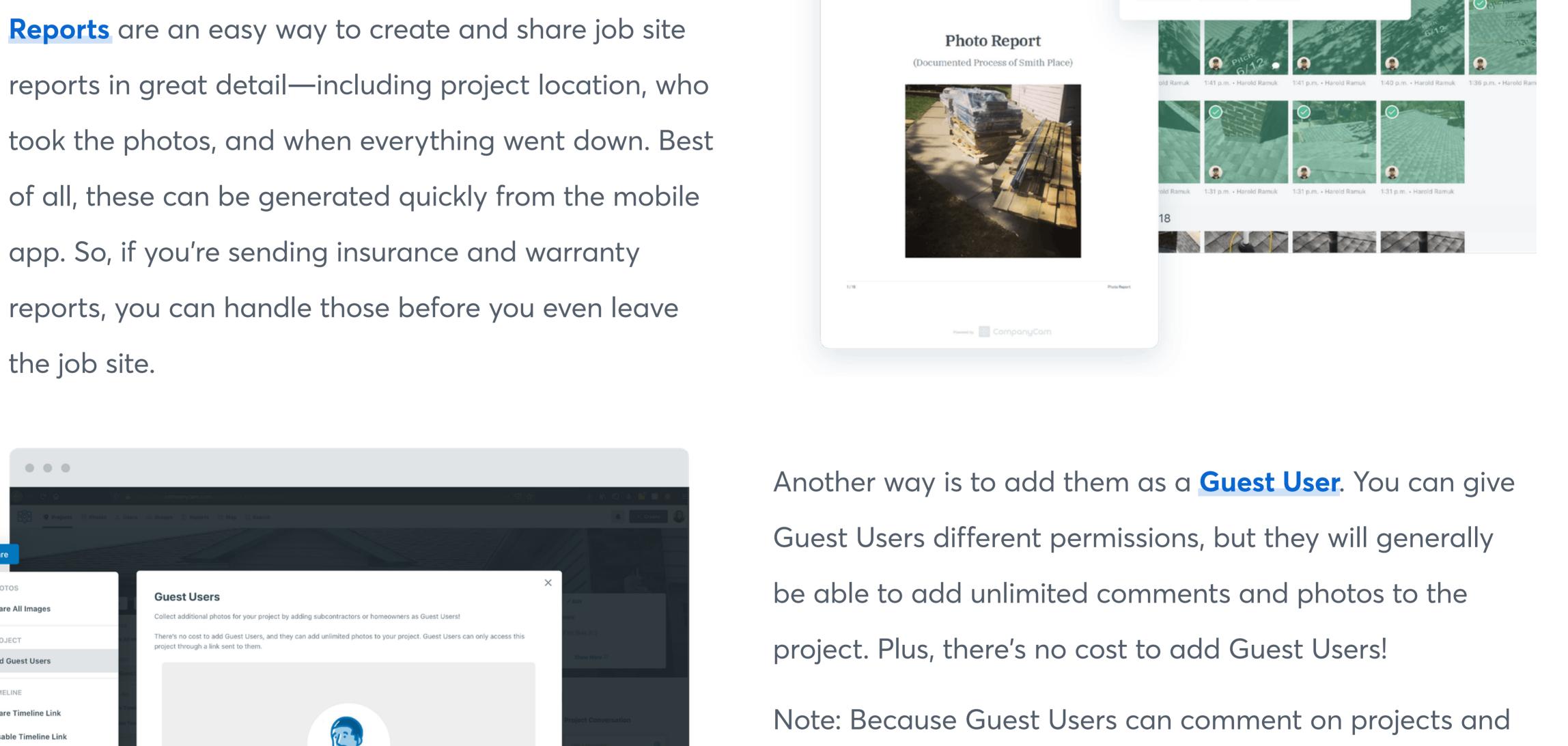
photos across a project and generate a shareable

Galleries allow you to compile specific images

the job site. 

reports, you can handle those before you even leave





f Facebook 😕 Twitter 🖴 Email

Rothman Roofing

success.

Project Timeline from Rothman Roofing

Lincoln, NE 68508

Rothman

Roofing

photos, you are setting yourself up for communication

**Boland House** 2902 Bellevue looking to "win" an insurance agent as a partner, they need to Drive trust you as much (or more than) the contractor they're currently

### One of the best ways to highlight your company's integrity and transparency is through the project timeline. Timelines are a

working with.

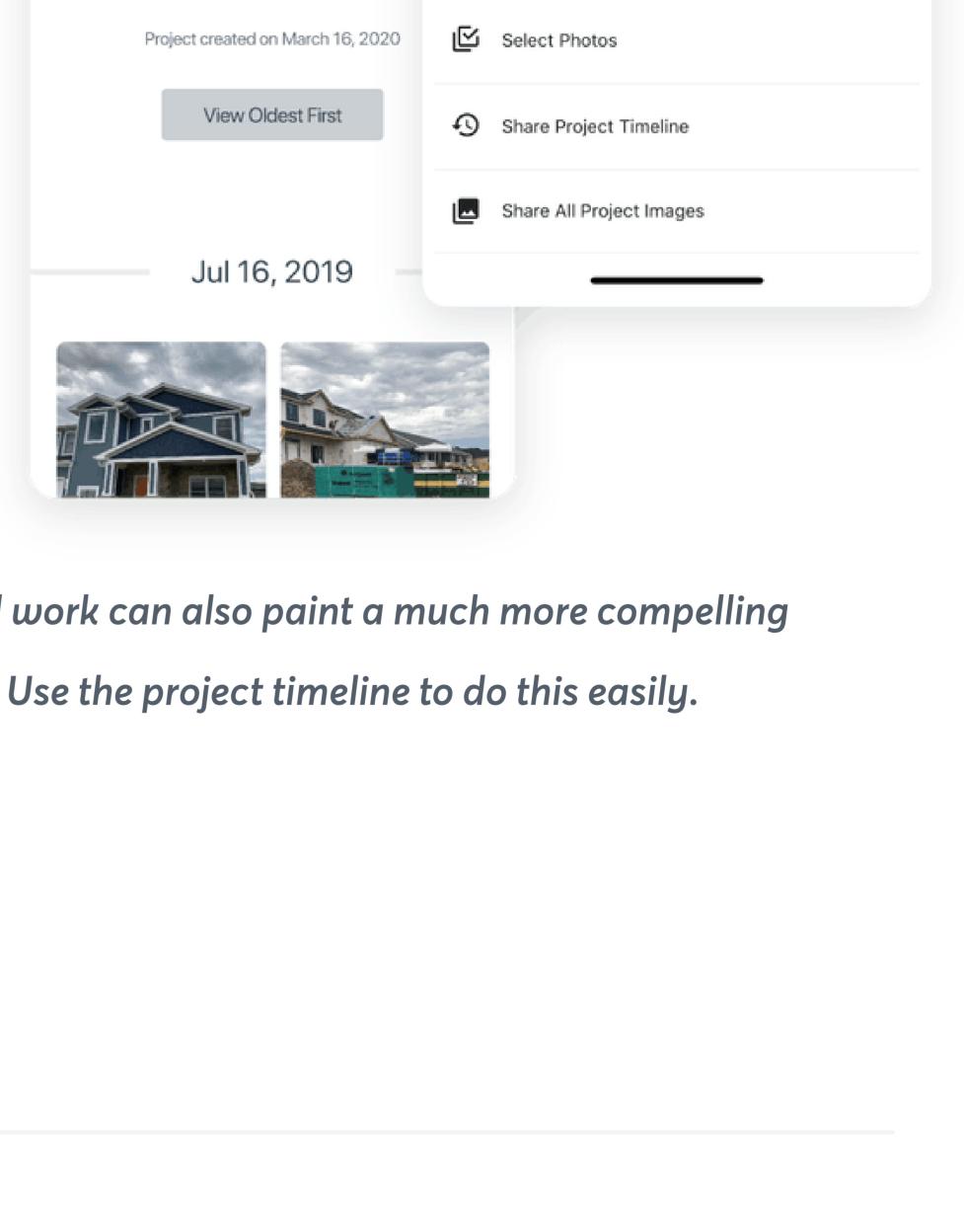
Share All Images

+ Add Guest Users

Disable Timeline Link

single, shareable link that automatically updates with new photos throughout the day. Agents and clients can see what's happening without pulling you away from the job to hop on a call.

Takeaway: Authentic photos of inspections, work in progress, and completed work can also paint a much more compelling picture for your referral partner about the quality you provide to your clients. Use the project timeline to do this easily.



Share Options

**EASY AS SUNDAY MORNING** 

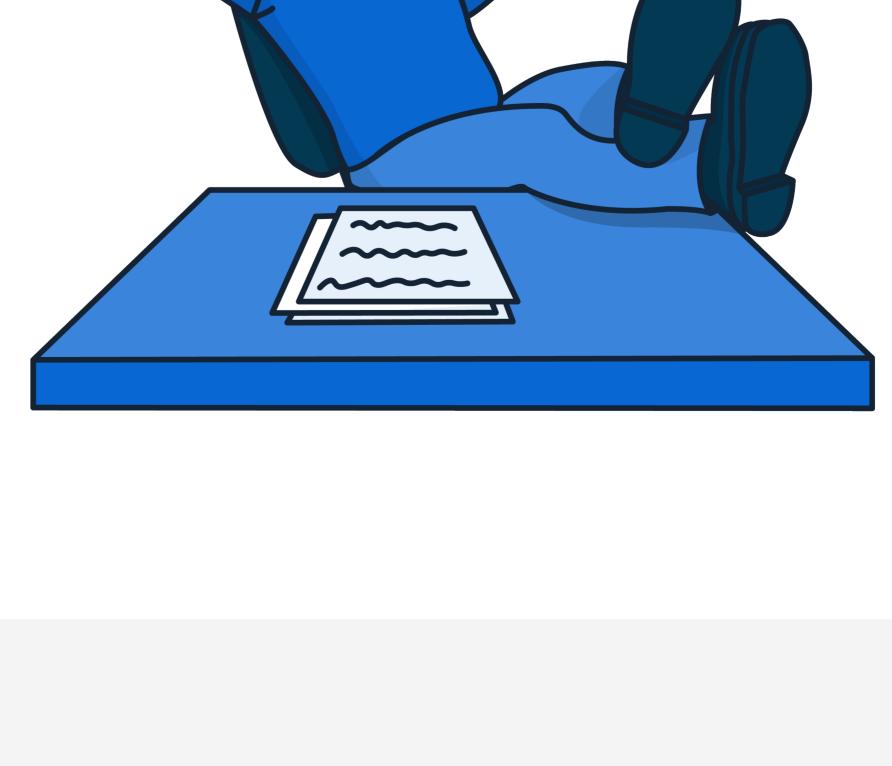
Have questions about referral relationships? You can get in

touch with Restoration Referral System at our website. Want a more in-depth look at how to use some of these CompanyCam features? Their site has a library of classes

Congrats, you made it to the end of this downloadable! Now you're

and earning referrals from insurance agents in your area.

ready to go forth and use CompanyCam to start building relationships





and how-to videos.

