



## Introducer Arrangement - an overview

### Introduction

Thank you for enquiring about being one of our Introducers. We take this as a huge compliment and we appreciate the trust you're investing in us to give your customers a truly exceptional service.

### How the agreement works

The arrangement is simple - tell your contacts about us, and encourage them to take a free no-obligation quote from us.

### How we'll reward you

For each new policy we arrange for one of your introductions, we will pay you a commission to the value of 25% of our earnings for that policy.

Even better – each and every time your referral renews their Insurance with us, we will pay you 15% of the income (for as long as our Introducer agreement is in place).

### Getting the most of our introducer relationship

It's important to us that you feel entirely comfortable with how the relationship works, which is why we give you complete control.

As you are in control of how the referrals are made, you set the pace and the tone of the whole exercise.

In the main, there are typically three types of introducer:

**The trouble-shooter** - these introducers recommend us only when their customers ask them directly for a recommendation for a good Insurance provider. Often they will simply provide our details and leave the customer to contact us.

The outcome is that referrals can be few and far between, and even when they are made, not all customers make contact.

**The proactive trouble-shooter** – these introducers still only really refer us when a customer raises a query about Insurance, but rather than hand out our details, they will simply offer to get us to call their customer.

This often proves to be a more successful approach, as the client is grateful for not having to make the call, and we are able to help more customers of the introducer.



Sometimes the proactive trouble-shooter will actively raise the subject of Insurance when he feels it appropriate.

**The strategic partner** – this introducer will make our introducer relationship a part of their everyday process, to one degree or another.

More than just proactive, the strategic partner will offer our services to almost every client they engage with, where appropriate.

For start-up companies, the strategic partner will make a point to raise the subject of Insurance, and agree for us to contact them.

Other strategic partners regularly write to their customers making reference to our relationship and encouraging them to engage with us (we help with wording, costs, etc).

### **Which one are you?**

We honestly don't mind which approach you wish to take to our introducer arrangement.

As long as you're happy, we're happy.

What we do know is, the strategic partner gets more out of the relationship than the trouble-shooters, simply because they help more of their clients and earn more commission.

### **We give the advice**

One thing we should make clear is that you are not expected to give any Insurance advice whatsoever, and in fact, our introducer agreement strictly prohibits it for your protection, our protection, and to satisfy the Financial Conduct Authority.

## Our promise to you

1. We'll review your customers' case annually based on their current circumstances and not just offer them the policy they had last year, without full consideration of alternatives; so you and they can be assured they're still getting the right cover and value for money.
2. We guarantee your customer will have one main point of contact for their account with us, and we'll give them mobile and direct office telephone numbers; so they can reach us easily without having to battle with call centres.
3. We will stay in touch with your customers throughout the year, to help ensure their Insurance stays up to date and relevant to any changes in your circumstances; giving them peace of mind that your cover is still correct.
4. If your customer needs to make a claim on your Insurance, we guarantee to respond to them and start the process on the same working day you contact us; so you and they can rest assured they're in good hands.

## Terms and Conditions

1. Subject to the terms and conditions of our Introducer agreement.
2. Subject to a minimum transaction income value of £50.00.



*"Evans Insurance knew exactly what I needed. Already, many clients have taken cover through Evans Insurance Brokers and are very happy I recommended them. Excellent service, thanks!"*  
– **Daniel Mobbs, Whittington Raymond Accountants**