

# NICK BERRY

## Communication Strategy for New Customers Post-Acquisition

### 1. Initial Announcement

- **Timing:** Within 24 hours of the acquisition closing.
- **Method:** Email and physical letter.
- **Content:**
  - **Subject Line (Email):** "Exciting News: [Your Agency Name] Joins Forces with [Acquired Agency Name]"
  - **Introduction:** A warm welcome to the new customers, acknowledging the acquisition and emphasizing that their current coverages remain unchanged.
  - **Key Message:**
    - "Your coverages and policies remain exactly as they are. No changes will occur unless requested by you."
    - Introduce the new team and assure continuity in service.
  - **Call to Action:** Invite them to reach out with any questions or concerns.
  - **Personalization:** Include the name of their existing agent (if applicable) and the new agent they will interact with.

### 2. Welcome Package

- **Timing:** Within 7 days of the acquisition announcement.
- **Method:** Direct mail and email.
- **Content:**
  - **Welcome Letter:** Reiterate the key message of continuity and introduce the new team.
  - **Team Introduction:** A brief bio and photo of key staff members who will be handling their accounts.
  - **Contact Information:** Provide direct contact details for their new point of contact.
  - **Customer Portal Access (if applicable):** Instructions on how to access their policy details online.

### 3. Customer Outreach Calls

- **Timing:** Within 2-3 weeks of the acquisition announcement.
- **Method:** Phone calls.
- **Content:**
  - **Script:**
    - Confirm receipt of the announcement and welcome package.

- Reassure them that nothing changes with their policies.
- Answer any questions they may have about the acquisition or their coverage.
- Offer a personal meeting or call with their new agent if they prefer.

#### 4. Social Media Announcement

- **Timing:** Concurrent with the initial announcement.
- **Platforms:** Facebook, LinkedIn, and other relevant platforms.
- **Content:**
  - Announce the acquisition, emphasizing the benefits to the customers and that their policies remain unchanged.
  - Introduce the new team with a group photo and brief bios.

#### 5. FAQs Document

- **Timing:** Available immediately after the initial announcement.
- **Method:** Linked in the email/letter and available on your website.
- **Content:**
  - Address common questions about the acquisition, policy continuity, and how the customers can expect service to proceed.
  - Include a section on how to reach out if they have specific concerns.

#### 6. Follow-Up Communication

- **Timing:** 3 months post-acquisition.
- **Method:** Email.
- **Content:**
  - Check-in message reiterating that their policies remain unchanged.
  - Share any positive developments or customer success stories since the acquisition.
  - Remind them of how to reach their new point of contact.

#### 7. Ongoing Engagement

- **Timing:** Quarterly newsletters or updates.
- **Method:** Email and direct mail.
- **Content:**
  - Continue to build the relationship by sharing agency news, highlighting customer testimonials, and offering insurance tips.
  - Encourage feedback and remind them of the consistent, unchanged service they've received.

This strategy ensures that the new customers feel reassured about the stability of their insurance policies while being warmly introduced to the new team and agency. The key is consistent, clear communication that reinforces continuity and trust.



## Email 1: Initial Announcement

**Subject Line:** Exciting News: [Your Agency Name] and [Acquired Agency Name] Are Now One

**Body:**

Dear [Customer Name],

We're reaching out with some exciting news—[Your Agency Name] and [Acquired Agency Name] have officially joined forces!

What does this mean for you? Simply put, nothing changes with your current coverage. Your policies, rates, and benefits remain exactly as they are. Our goal is to make this transition as seamless as possible while continuing to provide the excellent service you've come to expect.

You'll also have the opportunity to meet our expanded team. We're bringing together the best of both agencies to serve you even better, and we're thrilled to introduce you to some new faces. [Optional: You'll still be working with [Existing Agent Name] for any questions or support.]

If you have any questions or would like to discuss your policy, please don't hesitate to reach out. We're here to ensure you feel confident and informed every step of the way.

Looking forward to continuing our work together.

Best regards,  
[Your Name]  
[Your Title]  
[Your Contact Information]

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## Email 2: Welcome Package Announcement

**Subject Line:** Welcome to [Your Agency Name]—We're Here for You

**Body:**

Hi [Customer Name],

We're excited to officially welcome you to [Your Agency Name]. As you may have heard, we've joined forces with [Acquired Agency Name], and we're thrilled to have you as part of our community.

In the next few days, you'll receive a welcome package from us. Inside, you'll find more information about our team, how to contact us, and a few other useful details. This is all part of our commitment to making sure you have everything you need as we move forward together.

Remember, your coverage remains exactly as it is. There's nothing you need to do—just know we're here if you need us.

Feel free to reach out if you have any questions or if there's anything you'd like to discuss. We're always happy to hear from you.

Welcome aboard,  
[Your Name]  
[Your Title]  
[Your Contact Information]

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### **Email 3: Follow-Up Outreach**

**Subject Line:** Checking In—How Can We Assist You?

**Body:**

Hello [Customer Name],

A few weeks have passed since our agencies came together, and I wanted to check in with you. How are things going on your end?

We've been working hard to ensure this transition is smooth and that you continue to receive the same level of service you're accustomed to. If there's anything you've been wondering about, or if you just want to say hello, I'd love to hear from you.

Your coverage is still exactly the same, but we're here for any questions or concerns you might have. And if you'd like to meet with your new point of contact, we can set up a time that works best for you.

Looking forward to continuing our partnership and supporting you with all your insurance needs.

Best,  
[Your Name]  
[Your Title]  
[Your Contact Information]

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### **Email 4: 3-Month Follow-Up**

**Subject Line:** Three Months In—A Quick Check-In

**Body:**

Hi [Customer Name],

It's hard to believe it's already been three months since [Your Agency Name] and [Acquired Agency Name] joined forces. I wanted to take a moment to check in and see how things are going for you.

We've been busy ensuring that everything remains business as usual on your end. Your coverage and benefits haven't changed, but we're always looking for ways to improve your experience. If there's anything you need or any feedback you'd like to share, I'm all ears.

Thank you for being a part of our journey. We're here to make sure you continue receiving the best possible service.

Talk soon,  
[Your Name]  
[Your Title]  
[Your Contact Information]

## Letter 1: Initial Announcement

[Your Agency Letterhead]

[Date]

Dear [Customer Name],

I'm reaching out to personally share some significant news. Recently, [Your Agency Name] and [Acquired Agency Name] decided to come together. This partnership is designed to enhance the services we provide, and while it marks a new chapter for both agencies, the most important thing for you to know is that your coverage remains exactly the same.

You won't experience any changes to your policies, rates, or the benefits you currently enjoy. We understand that consistency is key when it comes to your insurance, and that's why we're committed to ensuring that the service you receive is seamless and uninterrupted.

You'll soon start to hear from some of our team members, who are here to support you just as you've always been supported. We believe that combining our strengths allows us to serve you even better. For those of you who've been working with [Existing Agent Name], they'll continue to be your primary point of contact, so you can rely on the familiar support you're used to.

We're excited about the possibilities this partnership brings, but most importantly, we're focused on maintaining the high standard of service that you deserve. Should you have any questions or if there's anything you'd like to discuss regarding this transition, I encourage you to reach out directly. We're here to make sure you feel confident and comfortable every step of the way.

Thank you for trusting us with your insurance needs. We're proud to continue serving you.

Warm regards,

[Your Name]

[Your Title]

[Your Contact Information]

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## Letter 2: Welcome Package Announcement

[Your Agency Letterhead]

[Date]

Dear [Customer Name],

As part of our recent collaboration with [Acquired Agency Name], I wanted to personally welcome you to [Your Agency Name]. You'll find enclosed a welcome package that's designed to help you get to know us a little better.

We understand that change can sometimes bring uncertainty, so I want to assure you that your coverage, policies, and the service you rely on remain exactly the same. There's no need for any action on your part—just know that we're here for you, as we always have been.

In the package, you'll find a brief introduction to our team, including the people who will be your main points of contact moving forward. We've also included useful information about how to reach us and details about the services we offer, many of which you might find helpful as we continue to support your insurance needs.

Our focus is on making this transition as smooth and straightforward as possible for you. We believe that by combining the best of both agencies, we can offer you even more resources and support. If there's anything you'd like to discuss or if you simply want to connect with someone from our team, please don't hesitate to reach out.

We're genuinely glad to have you with us and look forward to serving you in the months and years ahead.

Best regards,

[Your Name]

[Your Title]

[Your Contact Information]

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### **Letter 3: Follow-Up Outreach**

**[Your Agency Letterhead]**

[Date]

Dear [Customer Name],

It's been a few weeks since our two agencies came together, and I wanted to take a moment to check in with you. I hope everything has been running smoothly on your end, but I'm writing to see if there's anything on your mind that we can help with.

First and foremost, I want to reiterate that your coverage and policies remain unchanged. Our goal throughout this transition has been to ensure that the high level of service you've come to expect continues without any interruptions. We've been working closely with our team to make sure that everything is in place to support you, and I hope that you're feeling the same level of confidence in your coverage as you always have.



If you have any questions about the recent changes, or if there's anything specific you'd like to discuss—whether it's about your current policy or any other insurance needs—please know that we're here for you. We're also happy to arrange a time for you to meet with your new point of contact, should you wish to put a face to the name.

Your peace of mind is our top priority, and we're here to make sure you have everything you need. Don't hesitate to get in touch—we're always happy to help.

Thank you for your continued trust in us. We look forward to serving you.

Best wishes,

[Your Name]

[Your Title]

[Your Contact Information]

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## Letter 4: 3-Month Follow-Up

[Your Agency Letterhead]

[Date]

Dear [Customer Name],

It's hard to believe that three months have already passed since [Your Agency Name] and [Acquired Agency Name] joined forces. I wanted to reach out personally to see how you've been doing and to ensure that you're still feeling as confident in your coverage as ever.

Over the past few months, we've been focused on making this transition as smooth as possible for you, and I hope that's been reflected in the service you've received. Your coverage, policies, and rates haven't changed, and our commitment to supporting your needs remains as strong as ever.

That said, we're always looking for ways to improve. If there's anything you've noticed or anything you think we could do better, I'd love to hear your feedback. Whether it's a suggestion, a concern, or just a general comment, your input is invaluable to us as we continue to grow and serve you better.

Please feel free to reach out to me or your point of contact if there's anything on your mind. We're here to listen, to assist, and to ensure that you continue to feel secure with your insurance.

Thank you for being part of our community. We're grateful for your trust and look forward to continuing to serve you in the future.

Sincerely,

[Your Name]

[Your Title]

[Your Contact Information]