



CALL CONTROL

CALL CONTROL: *HAVE PURPOSE*

- CLEAR CALLING OBJECTIVES ARE YOUR ROADMAP, GUIDING THE CONVERSATION AND KEEPING IT FOCUSED TOWARDS ACHIEVING YOUR SALES GOALS
- CALL GOALS HELP NAVIGATE AND DIRECT THE CONVERSATION TOWARDS MEANINGFUL OUTCOMES, FROM CLOSING A SALE TO EDUCATING THE CUSTOMER ABOUT AN INSURANCE PRODUCT
- CALL GOALS CAN BE FLEXIBLE, ALLOWING YOU TO RESPOND TO THE CLIENT'S NEEDS WHILE KEEPING YOUR OVERALL OBJECTIVE IN SIGHT. STAY ADAPTABLE

CALL CONTROL: *ACTIVE LISTENING*

- **ACTIVE LISTENING:** THIS INVOLVES NOT JUST HEARING, BUT TRULY UNDERSTANDING THE CUSTOMER'S MESSAGES. IT SHOWS YOUR ENGAGEMENT AND HELPS IDENTIFY THEIR REAL NEEDS AND CONCERNS
- DIRECTLY ADDRESS CUSTOMER NEEDS AND CONCERNS, RESPONDING TO THE CONCERN, AND MOVING ON WITH THE QUOTE
- **BUILDING RAPPORT:** THIS ISN'T ABOUT ASKING A LIST OF QUESTIONS; IT'S ABOUT CREATING A CONNECTION WITH THE CLIENT, GETTING THEM TO KNOW, LIKE, AND TRUST YOU

CALL CONTROL: *WORD PATHS*

USE THESE WORD PATHS TO SUBTLY STEER THE CONVERSATION BACK TO THE QUOTE. THEY ALLOW YOU TO MAINTAIN CONTROL WITHOUT SEEMING INTRUSIVE OR DISMISSIVE OF THE CUSTOMER'S THOUGHTS

- *"That is a great question, we will get to that in just a few"*
- *"Thank you for sharing that with me, this shouldn't take much longer. Now I see here you don't have any coverage with us for your cars, what kind of car do you drive?"*
- *"I could talk to you all day about this, but let's get back to the quote."*

CALL CONTROL: *OBJECTIONS*

- **MAINTAINING MOMENTUM IN A CONVERSATION IS KEY. AVOID PAUSES WHEN CONFRONTED WITH OBJECTIONS TO PREVENT THE CLIENT FROM STEERING THE CONVERSATION AWAY**
- **ACKNOWLEDGE THE CLIENT'S OBJECTIONS OR CONCERNS. THIS VALIDATION MAKES THEM FEEL HEARD AND UNDERSTOOD**
- **SMOOTHLY TRANSITION TO EXPLAINING HOW YOUR INSURANCE PRODUCT CAN ADDRESS THE CUSTOMER'S CONCERNS. THIS APPROACH TURNS POTENTIAL OBSTACLES INTO OPPORTUNITIES FOR EDUCATING THE CUSTOMER AND MOVING TOWARDS THE CLOSE**

CALL CONTROL: *CLOSING*

- SUMMARIZE KEY POINTS DISCUSSED, CONFIRMING COVERAGES, AND OUTLINING THE NEXT STEPS
- ASK FOR PAYEMENT INFORMATION "LET'S GET THIS STARTED TODAY, WHAT IS YOUR ACCOUNT AND ROUTING NUMBER?"
- **GRATITUDE IS KEY**: REGARDLESS OF THE CALL'S OUTCOME, ALWAYS THANK THE CUSTOMER FOR THEIR TIME. THIS LEAVES A POSITIVE IMPRESSION AND FOSTERS FUTURE INTERACTIONS- SET THE FOLLOW UP