INTRODUCTION & APPRECIATION

- MAKE IT BRIEF
- STOP SAYING:
  - 'HI, KAREN, HOW ARE YOU TODAY? I'M SORRY, I KNOW YOU'RE BUSY BUT I AM REACHING OUT ABOUT THE AUTO QUOTE YOU REQUESTED."
- THANK THE CLIENT FOR TAKING YOUR CALL
  - "THANK YOU FOR TAKING MY CALL!"
- DON'T APOLOGIZE OR MINIMIZE WITH STATEMENTS LIKE:
  - "I KNOW YOU'RE BUSY"
  - "SORRY TO BOTHER YOU"
- MINIMIZING STATEMENTS DON'T SHOW THE VALUE YOU BRING!

PERSONAL VALUE STATEMENTS

- WHAT IS YOUR PERSONAL VALUE STATEMENT?
  - (YOURS, NOT THE COMPANY'S OR THE PRODUCTS)
- WHY SHOULD THE CLIENT TALK WITH YOU AND NOT OTHER SALES AGENTS?
- DO NOT RECITE YOUR ENTIRE RESUME
- PICK ONE REASON THAT IS RELEVANT TO THIS CLIENT

"I HAVE BEEN ABLE TO HELP DOZENS OF PEOPLE IN YOUR HIGH WILDFIRE AREA WITH THEIR HOME INSURANCE"

"I HAVE BEEN ABLE TO HELP DOZENS OF PEOPLE GAIN BETTER AUTO INSURANCE IN YOUR AREA"

PERSONALIZE & RAPPORT

- WHAT IS SOMETHING YOU KNOW TO BE TRUE ABOUT THIS CLIENT
- RAPPORT BUILIDNG IS NOT ABOUT THE BUYER USING YOUR PRODUCT
- ASK DISCOVERY QUESTIONS WHILE YOU START THE QUOTE
  - FAMILY
  - OCCUPATION
  - RECREATION
  - MONEY
- GET THE CLIENT TO TALK ABOUT THEMSELVES
- BEING LESS ROBOTIC OR SCRIPTED WILL ALLOW THE CLIENT TO OPEN UP TO YOU, LIKE AN OLD FRIEND

BENEFIT TO PROSPECT

- FOLLOWING RAPPORT BUILDING, STATE A BENEFIT
- NOT A FEATURE, BUT AN OUTCOME THAT WOULD BENEFIT THE PROSPECT
- MAKE IT RELEVANT TO THE CLIENT

"BECAUSE YOU HAVE A 16-YEAR-OLD DRIVER YOU NEED YOUR AUTO POLICY TO PERFORM WHEN AN ACCIDENT MAY OCCUR"

"BECAUSE YOU OWN YOUR OWN HOME THAT YOU ARE WORKING SO HARD TO PAY FOR, YOU NEED YOUR HOMEOWNERS POLICY TO PERFORM IF AN ACCIDENT WERE TO OCCUR"

VOICEMAILS

- KEEP YOUR VOICEMAIL SHORT
- DON'T LEAVE YOUR SALES PITCH IN THE VOICEMAIL
- DON'T USE A TRADITIONAL CLOSE, IT LESSENS THE CHANCE OF A CALL BACK
  - "PLEASE CALL ME BACK"
  - "I'LL CALL YOU BACK TOMORROW"
- USE A NORMAL, FRIENDLY, AND INVITING TONE
- PERSONALIZE IT
  - "NEXT TIME WE TALK, YOU'LL HAVE TO TELL ME MORE ABOUT X."
- END WITH YOUR PHONE NUMBER
- LEAVE THE CLIENT WANTING MORE