



## 6 Step Process for Data Leads

**THE HOOK - THIS IS THE OPENING 15-20 SECONDS OF THE CALL, WHICH IS THE MOST IMPORTANT PART OF THE PHONE CALL.**

1. "Hello is this \_\_\_\_\_?"
2. "Hi \_\_\_\_\_ This is \_\_\_\_\_ with Allstate i was just reaching out in response to your request for auto insurance. It looks like you were inquiring about your Honda Civic and your Ford F150. Is that correct?"
3. "It looks like/I see you are with Geico. Is that correct?"
4. "Awesome, and do you still live at this address?"
5. "Alright, thank you. Just curious, how much is your current insurer charging you/making you pay per month?"
6. "( repeat price back) wow that's interesting"
7. "Well I have a quote started for you here and it's coming back at a really good rate! Before I share that price with you, I want to see if I can apply any additional discounts that the system may have missed.."

- Creating that "Yes" momentum for the conversation.
- Overcoming Opening Objections- Most objections are reactionary and can be addressed simply.
- Agree and Acknowledge "I'm sorry I caught you at a bad time"
- Make sure you are texting at the start of the call.
- "Now, real quickly before I let you go, may I just confirm these are your vehicles you applied for?"
- Ask for a price. Well I have the quote started for you right here..." and continue the normal script.

**BUILDING VALUE INSTEAD OF SELLING ON PRICE: WHEN WE DISCUSS OUR PROSPECTS INSURANCE THERE ARE A FEW WAYS TO APPROACH SELLING INSURANCE. THE MOST SUCCESSFUL IS BEING A PROBLEM SOLVER.**

1. Check for understanding
2. Discuss 2-3 similarities
3. Fill 2-3 gaps in coverage

### **MULTI- LINING OTHER POLICIES**

Limit your conversation to just talking about what perils we do cover and review liability.

### **POST PRESENTATION: LUMP EVERYTHING TOGETHER FOR JUST ONE PRICE**

Don't compare your price to theirs. Make sure to emphasize savings in yearly amount and cost in monthly amount.

### **ASK FOR THE SALE EVERY TIME**

1. "There are two ways to pay"
2. "Do you normally pay in full or monthly?" Then "Awesome, Do you use a bank account or credit card?"
3. Either way, I can help with the cancellation of your other policy. Still get payment for the next month.
4. That's ok a lot of people like to keep their billing the same.

### **SALES WRAP UP AND ONBOARDING APPOINTMENT**

This is a great way to nail home the customer service and make sure you have everything squared away for compliance and follow up on referrals and life insurance.

Set appointment onboarding phone call "Now that we have you set up with insurance policies, I will submit this and reach out next week just to confirm everything went through underwriting smoothly and we have everything set up the way you like."