



QUICK TIPS

- Elevator Speech, 30 seconds or less. Who are you and WHY you are passionate about helping? Sell your value!
- Texting at the FRONT of the call, send over a text pic of your business cards. Text over the link to the quote!!!! Ask the client "hey is this your cell phone we are on, I am going to send you a text." Do not ASK, assume the text. Wait for them to respond YES. Literally tell them, I am waiting for you to reply yes...
- Questions for the beginning of the call: "What has you shopping for insurance?" "Besides price, what is important to you regarding your insurance policy/company."
- Occupation: "What do you do for a living? "How did you get into that?" Give them a chance to talk about themselves and have a genuine interest in their life!
- Agency Value, pillars of excellence: years in business, community involvement, years of combined experience. Any major catastrophes we have assisted with.
- Know your client: FORM, ask about Family, Occupation, Recreation, Money. Build rapport during this piece, get to know your client so you can give an honest recommendation.
- Quote on the spot, DO NOT call someone back with a quote, instead quote them while they are on the phone.



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- Do NOT let them rush you to get them off the phone, "this is important, let's spend time together getting you the best coverage." If they are too busy now, set an appointment for later. "Do you prefer mornings or afternoons, okay how about Tuesday at 4PM?"
- Educate your customer during the call, review coverages, go over the PUP and how it protects our clients. Offer the PUP but do not cram it down their throat, its okay to give them what they want. Its our job to education EVERYONE.
- PUPS, people who rent need a PUP, talk about the PUP and how it protects, "it's like having Allstate's best attorneys on retainer, less than \$2 a day."
- Still do a review, if you are calling for a cross sell still review the existing policy, do it in the beginning of the call. It can be a quick/mini review and thank them for being a customer!
- Life Insurance is NORMAL, many of our customers have life insurance, I am surprised you do not have coverage, let's get you set up today, this is important!
- STOP emailing people a quote without going over the quote first, they will never take your call again. Tell them you will email them the quote AFTER you have reviewed it together.
- Ask them how they currently pay their insurance, let them know we offer the same payment method and ask for the digits.
- Overcome Objections Twice, offer to speak with the husband on speaker phone, or add them to a call, remind them we are giving them great coverage and this is important, let's get this coverage in place today before something happens.