

The course, developed from the best practices of the true sales masters in the business is a comprehensive, highly interactive study of all aspects of successful insurance sales and production. Designed to help participants understand the practices and techniques of high performing producers, the practical course allows participants to learn in a classroom environment, rather than in front of prospects. The idea is to shorten the learning curve, and get new producers on the right path faster, and producers who are struggling in some areas back on track. The goal is to get producers achieving the sales results that you, and they, expect – quicker! Producers are provided with the information and tools that give the top producers their competitive edge, and then participants have an opportunity to practice and get feedback on their performance. The program covers basic, intermediate, and advanced insurance selling concepts. It allows ample opportunity to practice and develop the skills that will help them become more effective at selling (new and renewal), building and then growing their book. Industry specific cases, exercises, and examples are used. Pre-work, post work, and participation in role plays, as well as some evening work is required. New producers, producers who have not yet validated, and veterans who want a comprehensive refresher are welcome.

Seminar Overview / Program Content

Day 1

- Profile of a high performing producer
- Effective prospecting
- Qualifying
- Setting the appointment
- Opening the call
- Establishing rapport
- Conducting an effective needs analysis
- Overcoming objections
- Differentiating your sales offer
- Introduction to cases and role plays

Day 2

- Positioning yourself as a trusted advisor
- Advanced presentation techniques
- Identifying hot buttons
- Buying signals
- Closing the sale and gaining commitment
- Effective time management tools
- Techniques sales cases – role play and exercises

Day 3

- Generating more referral business
- Building your network
- How to effectively network, target/niche marketing
- Leveraging your competitive edge
- Unseating incumbent agent relationships and protecting your own
- Sales cases, role play and exercises

Day 4

- Applying effective sales management strategies to your personal sales activity
- Creating a winning sales plan, (plan started in class)
- Developing program business capability
- Conducting effective stewardship meetings
- Performance assessment
- Individual needs analysis, cases and exercises