

Telesales Best Practices

Urgency

- Use your discretion to determine whether an in-home or telesales appointment is best (*Refer to any federal or state guidelines from the CDC*).
- Attempt to book same day appointments but no later than 24 hours out.
- Use assumptive and strong language to tie down the appointment.
- Use assumptive and strong language to ensure spouse will be present.
- Don't insist on a Zoom meeting-the path of least resistance is the phone.

Preparation

- Practice FIRST before completing live telesales. Record yourself and rewatch.
- Get as much information as possible on the phone. Follow the [B.E.S.T. script](#).
- Have all tabs ready and open on your browser for ease of transition.
- Have a few options prepared ahead of time but be flexible if needs change.
- Ensure your backdrop is professional and simple (*artwork, or simple blank wall*).

Connection

- Be sure to present a solid role and purpose upfront. Be direct and transparent with your clients.
- Keep it simple. Don't make major changes to what you already do on the phone or in the home.
- Match and mirror the cadence and tone of your client.
- Look directly into the camera on your computer. Eye contact is key!
- Majority of the webinar should be a camera share. Don't bore your clients by only showing slides. Show your face!
- Build trust by asking quality open-ended questions. Listen more than you talk.

Transparency

- Build trust throughout your presentation.
- Be willing to provide a copy of your insurance license and driver's license.
- Screen share while quoting.
- Screen share while filling out the application.
- Consider asking 2-3 of your best clients to be character references.
- Explain the application/underwriting process in detail. Again, be direct and transparent with your clients.
- Record each appointment for compliance needs and future reference.

Technology

- Use two devices if you have them-a computer plus a tablet will allow you to draw and use "whiteboard" features for concepts, financial fire drill, showing options, etc.
- Ensure your internet bandwidth is strong. Consider using a hardwired connection.
- Send application signature requests while you are still with your client. Ensure receipt and have them electronically sign while you are still with them on the phone or web.



Build trust by asking quality open-ended questions. Listen more than you talk.