

SCORE

Phase II



SCORE Phase II is a comprehensive 5-day in-house coaching program, designed to work with both management and staff to successfully transition the personal lines business objectives into an executable plan.

Management Coaching:

By establishing activity protocols and implementing strong sales and communication coaching methods, the manager will successfully transition personal lines into a thriving growth oriented division within your organization.

By providing management with easy to monitor tracking methods, they will now see, at a glance, the progress their team is making and establish suitable action plans when required.

Staff Coaching:

Staff will learn the secrets to client segmentation by understanding what the different generations consider valuable.

This phase of the program will empower the staff with the methods and skills of building effective scripts for alternative product offerings, objections to price and referral campaigns.

SALES AND
SERVICE ARE BY
DESIGN
NOT BY CHANCE!

The SCORE Phase II program will provide:

- ▲ A clearly defined approach to realizing sales objectives
- ▲ Methods for utilizing the Broker Management System as a means to successfully monitor daily staff activity
- ▲ The effective use of score carding as a sales tool and means of reducing E&O exposure
- ▲ The ability to build effective, powerful phone scripts to deal with today's sophisticated client

Accreditation: 10 PDU - Administration
10 PDU - Technical



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