



SCORE

Phase I

SCORE Phase I is a comprehensive 5-day in-house training program, designed to bring your personal lines staff to a proficiency level where they can compete successfully with Direct Writers.

Sales and Insurance Product Training:

The three-stage approach will enhance abilities relating to insurance and product knowledge while giving the team the strategy to effectively sell and communicate these features and benefits to clients.

Your staff will be empowered through the formulation of a simple-to-follow **“Plan”**. Role-play and call-recording will develop the structure and confidence required to increase their closing ratios, improve retention levels plus initiate and convert more cross-selling opportunities.

Throughout the program, reference-rich material is developed and packaged for the participants, allowing them to have straightforward tools to guide them through all their Renewal, New Business and Endorsement conversations. With the introduction of Scorecards, Management has the ability to monitor and evaluate client conversations. This tool will reveal training opportunities and reduce E&O exposure.

SALES AND
SERVICE ARE BY
DESIGN
NOT BY CHANCE!

In the SCORE Phase I program, the participants will learn skills such as:

- ▶ Structuring phone conversations – the **“Plan”**
- ▶ 6-step approach to true client satisfaction
- ▶ Opening up the pipeline of communication
- ▶ How to deal with objections to price
- ▶ How to close an important sale
- ▶ Converting policy features into unique personalized benefits
- ▶ Organic approach to cross selling
- ▶ Managing client expectations

Accreditation: 20 PDU - Technical



GRADIENT SOLUTIONS

NAVIGATING CLIENTS TO MEASURABLE SUCCESS

1.888.376.2566 | 514.228.1551
info@gradientsolutions.ca
www.gradientsolutions.ca