

Common Sense Solutions

Teresa Allen



INSURANCE AGENCY TRAINING PROGRAMS TERESA ALLEN

Communication Central: Who am I, Who are YOU? 1-2 hours to meet your time frame
This program is specifically designed for insurance agents managing agency staff. Agents will take a communication style inventory that will identify their unique communication style and will then learn about other communication styles. This will help internal communication with team members as well as external communication with customers and prospects. An added bonus is that every agent participating will be given a clean set of materials to take back and share with staff. This program has been designed as the first of the series of programs as Teresa outlines what is necessary for an agency manager to positively communicate and develop a sales and service culture through subsequent training offerings, making them more likely to enthusiastically support future sales and service training.

Profiting from Common Sense Service: Close Encounters on the Front Lines

(Keynote or training timeframe to fit your program agenda)

In this dynamic program that shares the title of Teresa's best selling book, participants will learn the financial impact of service efforts on the profitability of their agency. Participants will enjoy true life stories from Teresa's book that each have a service message. Teresa will also interview key agents to incorporate true life stories and service lessons from the front lines of local agencies. Every participant will take away valuable lessons on:

- Going the extra mile for the customer**
- Handling Varied Personalities**
- The Positive Impact of Working as a Team**
- How to Project a Positive Attitude**
- The Value of Positive Spin in \$ to Your Agency**

Common Sense First Impressions & Telephone Skills 2-3 hours to meet your timeframe

Do you plan to grow your agency? If so, you won't want to miss this opportunity to sharpen the skills of your team members in two areas critical to success: First Impressions and Telephone Skills.

Customer retention hinges on the ability of your staff to communicate positively with clients who come to your office. Equally important to your success is the "voice" of your agency when communicating via telephone. After attending this session, participants will have increased performance both in-person and on the telephone as they:

- **Deliver Effective Greetings**
- **Listen With A Purpose**
- **Communicate Clearly & "Say It Better"**
- **Take Messages and Handle Holds & Transfers**

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Teresa Allen Insurance Agency Training Page 2

Common Sense Selling: The Art of Asking Questions 3-4 hours

Too often, opportunities for additional business in an agency are lost due to a lack of basic sales skills. In this course, participants will learn that the recipe for sales is not complicated, but does require that team members and agents learn the art of asking questions and then listen for sales opportunities. These sales opportunities can be developed profitably with an understanding of fundamental sales skills. Through a series of interactive exercises tailored to the insurance agency environment, agents and team members will become more confident and more effective sales generators for their agency. Topics include:

- Professional Salesperson or Professional Visitor?**
- Asking Questions to Determine Needs**
- Knowing Product Features/Selling with Benefits**
- Handling Objections**
- Going Beyond Order Taking to Cross Selling**
- Closing Techniques/ Furthering the Sales Process**

Common Sense Customer Conflict Management: Opportunity Knocks! 2-3 hours

Customer conflict in your agency can signal the end of a relationship or the beginning of an even stronger relationship. Teresa will work with agents and staff to identify common sources of conflict, and a plan for response that will save and grow business. Participants will leave with a better understanding of how to:

- Differentiate between Institutional and Transactional Complaints**
- Respond to Varied Levels of Customer Anger**
- Handle Complaints Originating from Agency Error, Customer Error, Policies, and Regulations**
- Avoid Conflict by Catering to Varied Customer Personalities**

Common Sense Sales and Service Recap 6 hours

Recognizing that in small agency operations, there may be turnover in staff, Teresa will offer a recap of the main principles taught during the training series as a “catch up” for staff hired after the training has been completed. Core elements of first impressions, telephone service, sales, and conflict management will be covered

Call today... we look forward to
helping you bring sales and service
skills to your agency staff!



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