



QUALIFY THEN PRESENT

Let's back up a bit. Is it possible to sell prospects completely over the phone without even having to travel to their home to meet and present to them? The answer is yes. That's one of the top benefits of selling insurance: the ability to sell it from the comfort of your own home.

Unfortunately, selling entirely over the phone can be harder than face-to-face appointments because a lot of trust is built through human-to-human contact that contains elements of subconscious interaction that help people form impressions to help them judge who is genuine, honest, and professional.

Human interaction and communication happen in five ways:

1. Gestures
2. Expressions
3. Mannerisms
4. Tone
5. Tempo

The only elements a prospect gets to use in a phone conversation to decipher the truth in what the insurance agent is saying are the last two: tone and tempo. People say so much more with gestures, expressions, and mannerisms in addition to their tone and tempo, so selling on the phone potentially limits the amount of rapport you can build with a prospect.

There are three main strategies that allow agents to build more trust when presenting over the phone:

1. Sending mail or emails that contain the information you're conveying to them in the form of product or company brochures, applications, or info about you and your company.
2. Inviting the prospect to an online web conference call with screen share capabilities where they can see what's on your computer screen as you go through plan information, testimonials, licensing, and quotes.
3. Not pressuring leads into making a decision on the first call but taking the time to walk them through the process. You can attempt to close the sale, but only after alleviating any concerns they may have.