

Sales Meeting Agenda

Question Asking Skills

Purpose: Develop Producers ability to ask greater questions. This skill will increase a Producers ability to create pain, engage with a client, challenge the thinking of the client, be perceived as high business acumen, and be perceived as a peer.

Preparation: Ask Producers to bring their top three questions they have ever asked on a sales call.

MEETING AGENDA

- I. Tell the group the purpose of the meeting.
- II. Ask each person to tell the top question they have ever asked and what happened when they asked that question (an example).
- III. Put them in groups (2s or 3s depending on the division of the group) and ask them to come up with the following:
 - a. Best question to change the way a client thinks about buying insurance (example: Other than the placement of insurance what quantifiable value do you expect and/or receive from your broker?).
 - b. Best Risk question (Example: How do you currently keep informed about emerging risks?).
 - c. Best question for closing a sale (example: I recommend you move forward with CFRS. Are you ready to take control of your risks by being proactive versus the traditional reactive model of buying insurance?).
 - d. Best opening question (Example: Why did you agree to accept this meeting with us?).
 - e. Best overall question to create pain (Example: Since insurance typically represents less than 10% of the total cost of risk, what is your company doing to manage the other 90%?).
 - f. Take any one specific risk where you believe your people struggle to understand and ask them to come up with a good question in that area (Example: Risk – Perpetuation; Question – Will you ever leave your business? If yes (duh), what have you done to plan for the different ways you may leave?
- IV. Have groups share their best questions with the entire group (just pick and choose a few of the best ones).
- V. You can also take these questions and type them up and re-distribute to the group after the meeting.

*You do not have to use all of these questions in the meeting. Pick the ones you are most comfortable leading and the ones that will bring the greatest value to the Producers.