

Sales Meeting Agenda

Telling Our Story

Purpose: To improve our ability to tell our value proposition story and share different ways to express our value.

Preparation: Tell all of the sales people they will be required to communicate how they express the company value proposition to prospects.

MEETING AGENDA

- I. Tell the group the purpose of the meeting.
- II. Have Producer Partner up.
- III. Ask Producers to choose who will go first. The first person will explain the strategy and concepts of what they do on most initial calls with a prospect. The other Producer will give them feedback. (Switch).
- IV. Ask the Producer who went first (above) to role play as if he/she were in a meeting with a prospective client and the client says, “why should I consider leaving my current insurance agency and do business with you?”
- V. Switch Producers. Have the second Producer answer the same question.
- VI. Bring the group back together and ask if someone was very impressed with what they heard someone do in the last exercise. Have that person explain why they liked it and what the message was that they heard. (This is a great learning experience because you are hearing the feedback from a “clients” point of view.
- VII. Ask each Producer to tell the group “one thing” they learned from the session today.