

## **Operations Training**

### **Cross Selling Inside the Line of Business**

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**Purpose:** Train service personnel to focus on the RESULT of a task – not just completing an ACTIVITY.

**Preparation:** Flip Chart and Markers. Draw a line down the center of the flip chart page. Write RESULT on the top of the left column and ACTIVITY on the top of the right column.

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**Facilitator:** Begin the session by stating the name and purpose of the session.

#### **EXERCISE**

Ask the group to define the word RESULT. Write down the answers on the flip chart in the RESULT column. Now ask the group to define the word ACTIVITY. Write down the answers in the ACTIVITY column.

Flip the page over and write the following:

**RESULT** – “Outcome of What We Do”

**ACTIVITY** – “Getting Something Done”

Ask the group the following questions: Which is most important? Getting a lot of things done or the outcome of what we do? Why?

Read to Group: When we focus on results it changes our approach to our activities. When we only think about activities our results can be inconsistent and possibly dangerous and negligent.

Let's examine some daily responsibilities and apply RESULTS focused thinking.

Ask the group to respond and then share the answers.

- Client Carrier Submission
  - Activity Thinking: Submitting the Application
  - Results Thinking: Sending a complete submission that “tells” our clients story in a clear, concise and compelling manner
- Send an email to detail follow up information to a client
  - Activity Thinking: Short, direct, just the facts message
  - Results Thinking: Well constructed, kind and detailed message that will enhance the client experience
- Renewal Presentation
  - Activity Thinking: Copy last year’s presentation and update a few numbers
  - Results Thinking: Review and develop a comprehensive proposal that is customized to the client and is error free and attractive
- Additional Topics:
  - Phone Call
  - Certificate of Insurance
  - Claims Report
  - Coverage Explanation

**Facilitator:** Read closing remarks.

RESULTS focused thinking. Change your focus and you change your outcome. Be intentional and purposeful with each activity and your results will take you to a new level of client experience. RESULTS = OUTCOME. Challenge yourself today to approach your work through a RESULTS lens. Celebrate the outcome, not just crossing activities off your list.