

# THE FIVE STEP CUSTOMER CONVERSATION



**TROPHY CLUB  
CONSULTING LLC**

"DISCIPLINE TAKES NO VACATION"

## THE FIVE STEP CUSTOMER CONVERSATION

### Emotional Connection

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### Credibility

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### Logic

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**FORM**

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## STEP ONE - THE SALES MATRIX

### Rules:

If you get stopped in any step revert back to the prior step and focus on FORM

Sell an appointment

All call backs get a text and calendar invite

Be prepared to overcome all objections at least once

### Appearance

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### How You Sound

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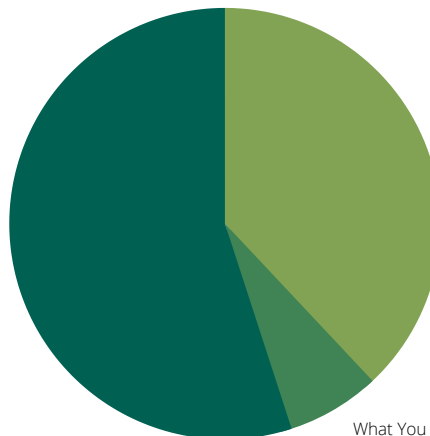
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### What You Say

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Appearance  
55%



How You Sound  
38%

What You Say  
7%



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## STEP ONE

**Time**

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**Money**

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**The Three Objections**

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## STEP TWO- FACT FINDING

**Rules:**

**No objections in Step Two**

**No presentation or advice given**

**Current Company**

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**Price**

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**Driver's License**

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**Social Security**

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## STEP TWO- FACT FINDING

Rent or Own

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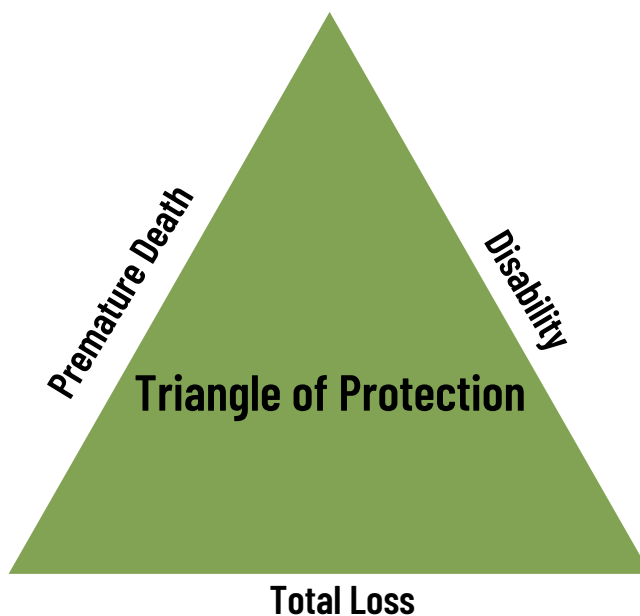
Triangle of Protection

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## SIX PRICE POINTS

Ineligible

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A Lot Higher

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Slightly Higher or Better

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The Same

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Slightly Lower

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A Lot Lower

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## STEP THREE- COVERAGE EXPLANATION

Transition Question

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Liability and Uninsured Motorist

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Comprehensive and Collision

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Medical Payments

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Rental Car Reimbursement

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Emergency Roadside

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S Coverage

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# THE FIVE STEP CUSTOMER CONVERSATION



## STEP FOUR - PRESENTATION

### Rules:

Present a minimum of three lines of business

Never give our price without having theirs

Everyone sells an in-person appointment

Present premiums monthly down to daily for financial services, savings annually

Present at least three lines based on customer needs

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Present price difference monthly down to daily, annually for savings

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Highlight our coverage advantages

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## STEP FIVE- CLOSING

### Rules:

Don't let the customer call the other company without you on the phone

Change needs to be simple and convenient

Let the customers do the talking

Set onboarding appointment

Did you make the transition from sales person to trusted advisor?

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Switch to us needs to be simple

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Let the customer do the talking

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Always refer back to FORM when you have an objection

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Sell an in-person appointment

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Make sure to call the other company and prepare the customer

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