

THE FIVE STEP CUSTOMER CONVERSATION


**TROPHY CLUB
CONSULTING LLC**

"DISCIPLINE TAKES NO VACATION"

THE FIVE STEP CUSTOMER CONVERSATION

Emotional Connection

Credibility

Logic

F

O

R

M

FORM

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"DISCIPLINE TAKES NO VACATION"

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

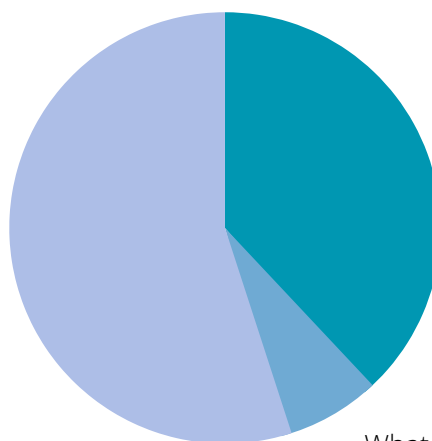
Be prepared to overcome all objections at least once

Appearance

How You Sound

What You Say

Appearance
55%



How You Sound
38%

What You Say
7%

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STEP ONE

Time

Money

The Three Objections

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STEP TWO- FACT FINDING

Rules:

No objections in Step Two

No presentation or advice given

Current Company

Price

Driver's License

Social Security

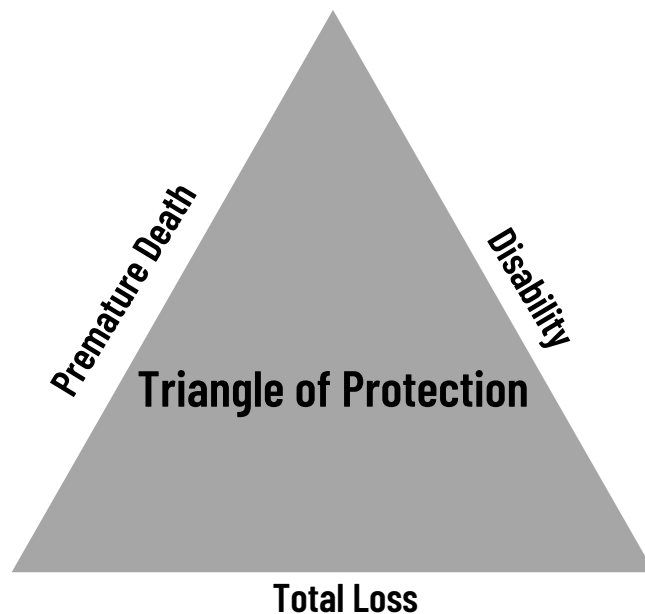
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STEP TWO- FACT FINDING

Rent or Own

Triangle of Protection



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SIX PRICE POINTS

Ineligible

A Lot Higher

Slightly Higher or Better

The Same

Slightly Lower

A Lot Lower

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STEP THREE- COVERAGE EXPLANATION

Transition Question

Liability and Uninsured Motorist

Comprehensive and Collision

Medical Payments

Rental Car Reimbursement

Emergency Roadside

S Coverage

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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

Present price difference monthly down to daily, annually for savings

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?

Switch to us needs to be simple

Let the customer do the talking

Always refer back to FORM when you have an objection

Sell an in-person appointment

Make sure to call the other company and prepare the customer
