Asking Discovery Based Questions

Scenario #1 – Agent

Instructions

Read the entire document before you begin. Close out Teams, Skype, and Outlook on your laptop to minimize distractions.

You will be playing the role of agent. Your goal is to make the experience realistic – not scripted. Use the prep time provided to form a character based on the "Who are you?" section below.

Bold text is a signal for you to improvise if needed.
Italicized text is for your knowledge only – do not share it during the interaction

Who are you?

You are a licensed CSR at a large independent agency. You do not go out and get the business, but you service existing policies and quote when needed. You signed up for a Policy Types webinar but didn't attend it. Your boss told you to sign up.

Mood / Temperament: You are not receptive to general information – you are all business. You are resistant to register if there is no benefit to you.
Objections: You share a login, why would you need your own? Also, are not logins just for the owners?
Agency Size: 9 Producers and 10 CSRs.
Current / Future Projects: None, you only quote when someone walks in the door with an urgent need. You sometimes do endorsements.

Write out 2 – 3 questions about the types of products <COMPANY> offers:
Remember, do not go into specific product details – you are not asking to view rate pages or read coverage forms.

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Scenario #1 – Marketing Rep

Instructions

Read the entire document before you begin. Close out Teams, Skype, and Outlook on your laptop to minimize distractions. Open Salesforce and other systems you normally prefer to have open (usassure.com, Workplace, etc.).

You will be playing the role of Marketing Rep. The agent you will be speaking with is tasked with making the interaction realistic; it is important you do the same. This is not a scripted rehearsal of the call quality scorecard.

Your objective is to successfully guide the agent to a piece of relevant content, whether it is a workshop, webinar, blog post, or resource. Do not just show them – get the "close" by walking them through the process.

Bold text is a signal for you to improvise if needed.
Italicized text are callouts for you to consider.

Intro & Discovery

You are calling a lead at a large independent agency. They signed up for the Policy Types webinar but didn't attend.

What is your objective for this call? Why?

What are 2-4 questions you can ask to create a connection and dig deeper into the agent's needs?
Avoid closed-ended questions.

What are 2-4 questions you can ask to generate engagement and earn buy-in from the agent?

Asking Discovery Based Questions

Scenario #1 – Marketing Rep

Notes:

Asking Discovery Based Questions

Scenario #1 – Observer / Coach

Instructions

Read the entire document before you begin. You will be playing the role of Observer / Coach. You are observing the overall interaction, keeping the follow responsibilities in mind:

- Timekeeping
  - Prep time: 5 mins
  - Call time: 10 mins
  - Debrief time: 15 mins
- Moderating the interaction to avoid:
  - Going too far down the “rabbit hole.” We are not here to talk about wind tiers and rate sheets.
  - Noticing when the session is no longer productive:
    - The Marketing Rep is going in circles and is clearly lost. Let it go on for 45 seconds or so to see if they recover. Stop the session and explain why. The session may be restarted.
    - The agent is so far off track that the focus of the call is on something other than what is outlined to them. This is different from being creative.
    - Any party experiences frustration to the point that they refuse to continue or give up. Notify Bill immediately. This is an extreme example and unlikely to occur.
    - To stop the session, wait for a pause in conversation to interject. Explain why you are pausing the session and ask if you can provide some feedback. Deliver and discuss your feedback and then agree to resume the session.
- Observing the Interaction to aid the debrief session:
  - Think to yourself: “What questions would I ask?” or “How would I do this differently?”
  - Write down examples where the interaction went well and where you identify opportunities
  - Consider questions that both the agent and the Marketing Rep can answer (about their role or each other’s)
  - Make no assumptions – if you need clarification as to how or why someone asked or answered something, ask!
  - Ensure that all feedback you have is constructive and that the conversation remains constructive
  - Remember, this is not about detailed product knowledge, it is about the interaction itself. Consider the questions they are asking, how they are overcoming objections, and how the call “flows.”

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Scenario #1 – Observer / Coach

Agent Scenario

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Marketing Rep Scenario

You are calling a lead at a large independent agency. They signed up for the Policy Types webinar but didn't attend.

What are 2-4 questions you can ask to create a connection and dig deeper into the agent's needs?
Avoid closed-ended questions.

What are 2-4 questions you can ask to generate engagement and earn buy-in from the agent?

Debrief Notes: