Learning Objectives

2019 Training Event

Topics

1. De-escalation
2. Opportunity Identification
3. Underwriting Q&A / Debrief
4. Sales Training
    a. Power of Silence / Conveying Confidence
    b. Asking Discovery Based Questions
    c. Overcoming Objections
5. Voice of <COMPANY>
6. Side by Sides

De-escalation

1. Recognize situations that can cause frustration for an agent when executing outbound calls
2. Interpret words and phrases used by an agent that indicate frustration, stress, and / or anger
    2.1. Articulate and acknowledge the agent's concerns by mirroring / confirming understanding
    2.2. Compare and contrast urgency vs. anger / frustration
3. De-escalate agents who express varying levels of frustration and anger
    3.1. Identify how stress affects both parties in a conversation
    3.2. Utilize words and phrases to convey a willingness to listen and / or help
    3.3. Practice and refine techniques that help moderate internal emotions
4. Describe the difference between empathy and sympathy and its impact on an interaction
5. Use best practices to avoid escalating a call

Opportunity Identification

1. Recognize opportunities to turn a neutral or negative situation into a positive one
    1.1. Respond appropriately to agents who mention product-specific situations, such as underwriting holds.
    1.2. Respond appropriately to agents who share a negative experience with <COMPANY>
2. Identify words and phrases while handling calls that indicate a potential opportunity to move an agent through the sales funnel
    2.1. React to potential opportunities in a way that benefits the agent and <COMPANY>
        2.1.1. Develop a list of common opportunities and potential paths to conversion / submission
        2.1.2. Role-play opportunities / paths
        2.1.3. Refine and finalize list based on role-playing session
    2.2. Uncover potential opportunities in calls and emails with agents

Learning Objectives

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Underwriting Q&A and Debrief

1. Utilize agent-provided information to determine follow up questions, next steps, or potential pitfalls
2. Demonstrate an appropriate level of product knowledge
   - 2.1. Assess the level of detail based on the source of information (i.e., Underwriter)
   - 2.2. Interpret complex knowledge and determine what applies
   - 2.3. Relate information clearly to an agent
3. Use context clues, probing questions, and inferences to identify issues and respond appropriately
   - 3.1. Review common issues or statements
   - 3.2. Compare issues to identify overarching similarities

Power of Silence / Conveying Confidence

1. Demonstrate positive and effective use of silence
   - 1.1. Distinguish positive and negative uses of silence
   - 1.2. Point out how silence is percieved during conversations
   - 1.3. Role-play situations where silence has a positive effect
2. Demostrate confidence during conversations
   - 2.1. Establish a baseline level of confidence as a member of the marketing team
   - 2.2. Balance confidence level based on feedback from an agent and adjust
   - 2.3. Practice tone, word choice, and inflection when delivering information to an agent

Asking Discovery Based Questions

1. Demonstrate the ability to ask discovery-based questions to gain relevant information
2. Determine the relationship of multiple discovery-based questions to reach an end goal

Overcoming Objections

1. Respond appropriately to agent objections to complete an action
   - 1.1. Review common list of objections
   - 1.2. Formulate responses to overcome objections

    1.3. Role-play situations where overcoming objections is necessary to the success of a call

2. Successfully overcome at least one agent objection

Voice of <COMPANY>

1. Integrate the tone and structure of <COMPANY>’s brand into the learner’s personal written and verbal communications
    1.1. Discuss generally accepted ways to address people
    1.2. Replace slang and company jargon with generalized language that the industry understands
    1.3. Evaluate and match a caller’s tone, inflection, rate of speech, and word choice to help increase understanding and build rapport
2.