

Introduction

Create a Connection

- Who are you?
- Who are we?
- Why are we calling?
- Why should they care?
- Do they have time to talk?

Dig Deeper

Create Engagement

- **Discover:**
 - Why US Assure?
 - Why now?
 - What do they do at the agency?
 - What lines of business do they focus on?
 - What are their highest business priorities and pain points?
- **Think About:**
 - Are you actively listening? Who is talking more, you or them?
 - Are you asking open-ended questions to better understand their interests?
 - Are you validating their emotional responses?
 - Are you providing product / resource information based on their individual needs?
 - Are you generating interest around US Assure's offerings?

Earn Buy-in

- **Influence:**
 - They express to you why *they* think they need our resources / products.
- **Think About:**
 - Are you assuming they want this information without asking them?
 - Are you using closed-ended questions to guide them to the close?
 - What are their objections?
 - Are you able to overcome them?

Close

- **Motivate:**
 - Ask them directly to take immediate action.
- **Think About:**
 - Are they doing it because you asked, or are they doing it because they want to?
 - Are you moving them through the marketing / sales funnel?
 - Are you taking the easy way out by sending them an email they won't read?