OC

Open Claw Sales Playbook

Insurance & Professional Services | 30-Minute Demo Framework

50 Objection Handlers • 6-Phase Call Structure • Post-Call Checklist

Call Structure Overview

A 30-minute framework designed to build trust, demonstrate value, and close naturally.

PHASE 1 | 0:00 - 3:00

The Warm Open

Human connection, not a pitch

PHASE 2 | 3:00 - 8:00

The Diagnosis

Establish yourself as the expert

PHASE 3 | 8:00 - 20:00

Contextual Demo

Show THEIR future, not features

PHASE 4 | 20:00 - 23:00

Social Proof

Remove the fear of being first

PHASE 5 | 23:00 - 27:00

Implementation

Make the next step feel easy

PHASE 6 | 27:00 - 30:00

Natural Close

Next step, not a signature

PHASE 1 | 0:00 - 3:00

The Warm Open

Goal: Human connection, not a pitch. Kill the "sales call" energy immediately.

OPENING SCRIPT

"Hey [Name], appreciate you making the time. Before I show you anything — I'd love to understand what's actually eating up your team's time right now. What does a typical Monday morning look like at [Agency Name]?"

DO NOT START WITH:

"Thanks for hopping on" or "Let me show you"

KEY MOVES

- Let them talk 60-90 seconds uninterrupted
- Take visible notes (share screen with notepad or nod verbally)
- Mirror back their pain: "So if I'm hearing you right, your team spends [X hours] on [thing]?"

PHASE 2 | 3:00 - 8:00

The Diagnosis

Goal: Make them feel understood, not sold to. Establish you as the expert who "gets it."

1 **"How many of those tasks are the same steps, just different client names?"**

Surfaces the automation opportunity

2 **"When a new lead comes in, what happens between first contact and client?"**

Surfaces the pipeline/workflow gap

3 **"If I asked your best employee what they wish they could stop doing?"**

Emotional hook — frames the tool as giving time back

4 **"Have you tried automating any of this before? What happened?"**

Surfaces past failures — positions Open Claw as different

TRANSITION LINE

"That's actually exactly the kind of mess Open Claw was built to clean up. Let me show you..."

PHASE 3 | 8:00 - 20:00

The Contextual Demo

Goal: Show THEIR future, not your features. Every screen maps to something they said.

MOMENT 1

The Monday Morning That Doesn't Su

Show dashboard relevant to their intake/lead management.
Narrate: "Remember how you said [pain]? Here's what that looks like now..."

MOMENT 2

The Thing That Used to Take Hours

Pick their #1 time-sink. Walk through it in real-time.
"Agencies like yours typically cut this from 3 hours to 15 minutes."

MOMENT 3

The Stuff You Didn't Know You Were Missing

Show ONE unexpected capability (reporting, insights, follow-ups).
"Once they have it, they can't go back."

DEMO RULES

- Never say "and it can also do..." (feature dumping kills deals)
- Every feature must connect to something THEY said
- If they interrupt, STOP and answer — engagement is the goal
- Use their language: "policies" not "records," "insureds" not "users"

PHASE 4 | 20:00 - 23:00

The Social Proof Bridge

Goal: Remove the "am I the first person crazy enough to try this?" fear.

STORY TEMPLATE

"We set this up for [similar agency type — size and specialty].
Their biggest headache was [same pain point the prospect mentioned].
Within [timeframe], their team went from [old reality] to [new reality].
The thing [contact name/role] told us was — it wasn't just the time saved,
it was that their people actually liked coming to work again because
they weren't doing mindless data entry."

Same Industry

Match the prospect's agency type

Same Pain Point

Mirror what they raised on the call

Specific Outcome

Hours saved, errors reduced, revenue imp

Human Element

Team morale, client satisfaction

PHASE 5 | 23:00 - 27:00

The 10-Day Setup Walkthrough

Goal: Make the next step feel easy, inevitable, and low-risk.

PHASE	WHAT HAPPENS	THEIR EFFORT	TIMELINE
Discovery & Mapping	45-min call, map current workflows, identify quick wins	1 call	**Days 1-2**
Build & Configure	Build Open Claw around YOUR processes — not a generic template	Light async review	**Days 3-7**
Launch & Train	Train your team live, make real-time tweaks until it feels right	1 team session	**Days 8-10**

COST-OF-INACTION SEED

"You mentioned your team spends [X hours/week] on [pain point]. If we cut that in half, that's [Y hours/month] your team gets back. What would they do with that time?"

Let them answer. They'll sell themselves.

PHASE 6 | 27:00 - 30:00

The Natural Close

Goal: Next step, not a signature. Reduce friction to zero.

CLOSING SCRIPT

"Here's what I'd suggest as a next step — no pressure, genuinely.
If what you saw today makes sense for [Agency Name], let's book that discovery call.
It's free, and even if you decide not to move forward, you'll walk away with a
clear picture of where your biggest time drains are. Fair enough?"

IF THEY HESITATE

"Would you want me to send a summary
of what we talked about with rough numbers?
That way you can share with [partner/team]."

NEVER DO

- Apply pressure
- Offer a discount to close today
- Say "I'll follow up" without a specific date
- End without a defined next action

Call Energy Cheat Sheet

Match your energy to where the prospect is emotionally at each phase.

MOMENT	YOUR ENERGY	THEIR ENERGY
Open	Curious, relaxed	Guarded, evaluating
Diagnosis	Expert listener	Opening up
Demo	Confident narrator	Leaning in
Social Proof	Peer storyteller	Reassured
Setup	Transparent guide	Mentally planning
Close	Calm, no-pressure	Ready to act

Price & Budget
Objections #1-6 • 6 handlers

Cost, budget, discounts, ROI, cheaper alternatives

Time & Implementation
Objections #7-11 • 5 handlers

Too busy, too fast, no tech staff, busy season

Trust & Credibility
Objections #12-17 • 6 handlers

Past failures, never heard of us, references

Decision-Making
Objections #18-22 • 5 handlers

Partners, IT, committees, not the decision maker

Competitors
Objections #23-27 • 5 handlers

Existing tools, DIY, in-house, evaluating others

Fear & Change
Objections #28-33 • 6 handlers

Adoption, data migration, security, AI fears

Timing & Urgency
Objections #34-37 • 4 handlers

Think about it, next quarter, contract lock-in

Scope & Fit
Objections #38-42 • 5 handlers

Too small, too big, integrations, compliance

Price & Budget

#1 What's the cost?

It depends on workflow complexity. Most agencies recoup setup cost within 60 days from time savings alone. It's math you can do on a napkin.

#2 That's too expensive

You mentioned your team burns [X hours/week] on [task]. What does that cost in payroll? The question isn't whether this costs money — it's whether the current way costs more.

#3 No budget right now

Is it genuinely no budget, or not yet allocated? If it's the second, I can help build the internal business case with exact savings numbers.

#4 Can you do it cheaper?

We could strip it down, but then it's half-built and your team fights it. What I can do is phase it — start with highest-impact workflow first, prove the ROI, then expand.

#5 Cheaper alternatives exist

The gap isn't the software — it's the setup. Cheaper tools assume 60-80 hours of technical configuration. We deliver 10 days to done, built for your workflows.

#6 Need to see ROI first

With a 10-day setup, you'll have real data within the first month. You'll know within 30 days whether this is working.

OBJECTIONS | TIME, IMPLEMENTATION & TRUST

Time, Implementation & Trust

#7 Too busy to implement

That's usually the signal you need it most. It's 10 days. Your team's involvement is 2-3 hours total. We do the heavy lifting.

#8 10 days sounds too fast

We're not building from scratch. Think of it like moving into a built house versus building one — we're arranging the furniture.

#9 We're in busy season

Best time to see the cracks. We build during your busy period with zero disruption, launch the day things settle.

#10 No technical staff

You don't need one. We handle setup, configuration, and post-launch support. Your team just uses it like email.

#12 Tried tools before, nobody used them

Those tools failed because someone dropped it on the team and said 'figure it out.' We build around how your team already works.

#13 How do I know this works for us?

That's why the discovery call exists. I'll tell you honestly if it's not a fit — losing a deal costs less than a bad setup.

Decision-Making & Competitors

#18 Need to talk to partner/team

Would a one-page summary help? Not a brochure — your workflows, time savings, rough numbers. Easy for them to see the picture.

#19 Send me some information

A PDF won't capture your specific pain points. Let me send a personalized summary of today's call instead — that's actually useful.

#21 I'm not the decision maker

Who else would weigh in? I can jump on a quick call with them, or give you a summary that makes you look great for bringing this forward.

#23 We already use [competitor]

How's that working? The question isn't whether you have a tool — it's whether that tool saves time or creates different admin work.

#25 Current system works fine

"Fine" and "great" are different. What does [X hours on task] look like in 12 months? The cost of "fine" is invisible until you see "great."

#27 My developer can set this up

Configuring software is 30% of the job. The other 70% is understanding insurance workflows and knowing which automations move the needle.

OBJECTIONS | FEAR, CHANGE & TIMING

Fear, Change & Timing

#28 My team won't adopt this

On launch day, training isn't 'learn a new tool.' It's 'the same thing you do now, but 3 clicks instead of 30.'

#30 What's the exit strategy?

Open-source means you're never locked in. Your data is yours. We've made it easy to leave, which means we earn your business.

#32 Worried about AI replacing staff

This isn't about replacing people. Agencies that automate well don't fire people — they grow without having to hire.

#33 What about data security?

Open Claw can keep data in your environment. You control where your data lives, with documentation for compliance requirements.

#34 Let me think about it

What specifically do you want to think about? Sometimes I can clarify something now that saves a week of going back and forth.

#35 Maybe next quarter

Between now and then, your team will spend [X hours] on the things we discussed. I'll set a reminder for [specific date].

OBJECTIONS | SCOPE, FIT & WILDCARDS

Scope, Fit & Wildcards

#38 We're too small for this

Smaller agencies get the most dramatic results. Every hour wasted hits harder. We build exactly what you need, nothing more.

#39 We're too big/complex

10 days covers core workflows. For larger agencies, we phase it: high-impact first, layer complexity over following weeks.

#40 Does this integrate with [X]?

Let me check that specific integration within 24 hours with a definitive answer — not a 'probably.'

#46 Need to see it with our data

During discovery, we can do a proof of concept with a sample of your real workflows. Takes an extra day, eliminates guesswork.

#48 I don't understand what this does

The robot stuff gets handled by the robot. Your team does the human stuff — talking to clients, making decisions.

#49 Seems too good to be true

It won't be perfect on day one. But every agency we've set up has kept using it, and the time savings are measurable.

Post-Call Checklist

Complete within 2 hours of the call ending. Consistency here wins deals.

- [ ] **Send personalized follow-up email** — 2 hours
  Reference specific pain points THEY mentioned. Not a template.
- [ ] **Include 1-page summary document** — Same email
  Written for THEM, not a brochure. Their workflows, their numbers.
- [ ] **Propose 2 specific discovery call times** — Same email
  Don't say "let me know when works." Give options.
- [ ] **Connect on LinkedIn** — Same day
  Personal note referencing the conversation. NOT a pitch.
- [ ] **Set CRM follow-up reminder** — 48 hours
  If no response in 48 hours. Log pain points, team size, current tools.
- [ ] **Handle the silent no** — 48 hours
  "No pressure, but if timing isn't right, just let me know."

Go Close Deals.

Remember: You're not selling software.
You're selling your team's time back.

Open Claw • 10 Days to Done • Built for Insurance & Professional Services