

Staying on Top of Prospects in a Remote Setting by Phone and Email

The work-from-home environment is the ultimate test in staying on top of prospects. Unnurtured relationships can easily fade, or you can take this as an opportunity to put your best foot forward. One thing we know for sure is that everything has changed with this pandemic. However, the need for insurance has not. That yearly renewal is happening no matter what. Opportunity awaits when you follow these tips to stay on top of prospects!



By Amanda Puppo

Build Rapport & Empathy

Gatekeepers have one job as it relates to receiving sales calls - they are expected to screen out calls that may be deemed as not deserving of their boss's time. For this reason, it's not shocking when you make a phone call and get shooed away. Yet, insurance does require discussion at least once a year, and either they will renew or switch. There are few topics that are difficult to cold-call for, but there are two things we know for sure:

1. Producers have the power to make a difference in gatekeeper responses by building rapport and demonstrating empathy.
2. Making warm calls over cold calls wins every time.

When you call, be sure to show the person on the other line that there is a name, a face and a real human behind the call. Use cues from the gatekeeper, such as tone and pace, to build some commonalities. If there is a timely light-hearted topic (upcoming holiday, weather event, etc.),

use it before rushing into a sales pitch or asking for important information. Did you ask them their name on a prior call to utilize it on the next call? Use a script to cover all of your qualifying questions, but mostly be (your best) authentic self.

After a strenuous year, empathy has become essential. Prospecting by phone does not have to be robotically transactional. According to Hubspot, 69% of consumers said a positive sales experience begins with a representative listening to their needs. Another 61% emphasized the idea of not being too pushy. It is essential to listen to your prospect carefully and deliberately in the answers they give and explain how your value-proposition benefits them. If you have historically been a "quote shop generalist" - this may be an opportunity to rethink your value proposition by industry. Consider how you can use your expertise to be thought of as a "trusted advisor" through consultative selling. This means asking the right questions and demonstrating your understanding of their type of business and industry. By building rapport, being empathetic and asking solid questions to understand needs, you can connect to prospects on a deeper level. In turn, your company can develop long time customers and gain referrals.

Requalify and Research

Closing a sale requires more than just one good conversation. A relationship is excellent on the surface, but if the prospect is not a qualified opportunity for your company, it will not result in a profitable sale. Some groups only pay commission past the first year to commissions over

\$2,000, for example. So, if you're going to spend your time, you may want to do so in the larger commissioned opportunities. To delve deeper, your company should first determine whether current qualification factors make sense in light of the pandemic and reduced workforces. Various industries had to pivot, including your prospects' businesses. By requalifying, you do not waste time and resources targeting your marketing and sales efforts to the wrong organizations.

Your qualifying questions may include decision-maker name and staff size (since we can't ask the receptionist what premium they're paying or what their MOD is). These qualifying questions answered make the next call show that you are 'researched' and you may have an easier time getting in the door - thusly - creating the warm call. A well-researched prospect will make your next phone call better and establish credibility.

Research requires both qualification phone calls and the internet. Both are important and should be used in tandem to determine whether a prospect is



the right fit. Talking on the phone with a gatekeeper can give you the tiniest bits of information, from makeup and structure of the company to how many trucks they have, staff size and even an upcoming vacation for your decision-maker. When researching online, be sure to check out the company's website (the "about us" and leadership page, especially) along with their LinkedIn pages, where you can find information about decision-makers, size of business and further contact information such as email. See if they have any statements about

COVID-19 and their current situation.

However, do not fall into a Google research tornado. Look for the key points quickly, know when to reach out by phone and know when to move on to the next prospect.

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Research not only allows you to qualify, but it also helps with our first point, building rapport. It will show the prospect you spent the time to get to know the company and make a unique connection with them!

Multi-Channel Marketing

Now that you have built a foundation and researched your prospect, it's imperative to stay fresh in their minds. Though the prospect only renews their insurance once per year, subtle brand awareness throughout the year will allow your name to become recognizable once it is time to give them a ring.

How do we continue to let automation allow us to stay top of mind with our prospects? Consider the use of email along with each sales call, as well as an automated email newsletter once a month and direct mail on occa-

sion. An email gives the decision-maker the path to gain more access to your company through links and calls to action. Even better, email marketing statistically measures its efficacy, so you can understand if it works for your target market. Retention Science has shown that using a decision-maker's first name in the subject line will make them more likely to open the email.

Dale Carnegie said, "A person's name is to him or her the sweetest and most important sound in any language."

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