

10 WAYS TO BOOST YOUR INSURANCE SALES

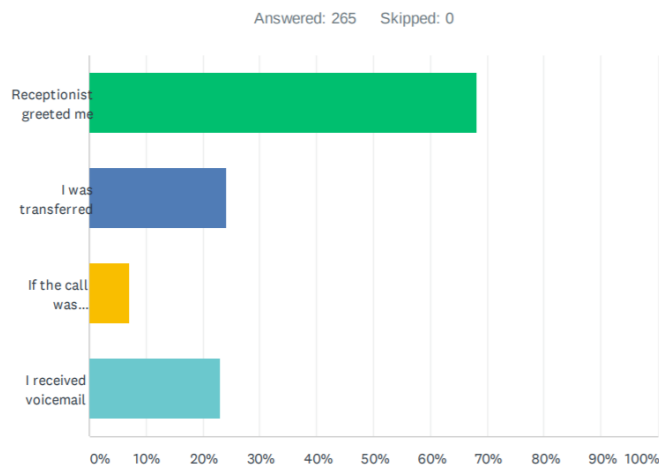
SECRET SHOPPER CALLS

- Results from 265 Secret Shopper Calls
- February 2018-October 2020
- Average score 34% out of 100%
- Highest score 86%

1. NEVER LET A LEAD GO TO VOICEMAIL

- 23% of callers were put into **voicemail**.
 - Many of them didn't receive a return call for days
 - Several had to try to call again

Q6 How was the initial call into the agency handled?

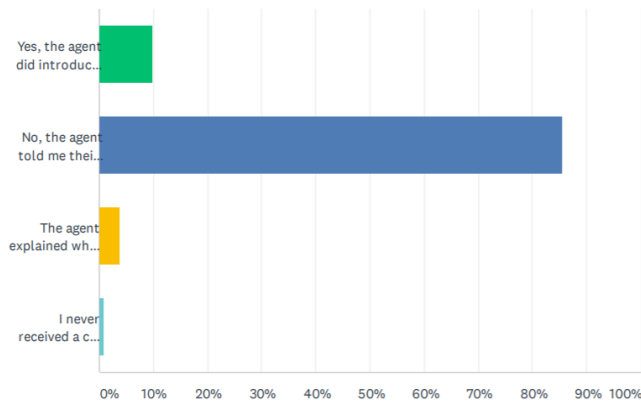


2. WHY ME? WHY YOUR AGENCY?

- 85% of agents built **no value** in themselves.

Q7 Did the agent introduce themselves and explain a bit about why they personally should be selected as your agent?

Answered: 264 Skipped: 1



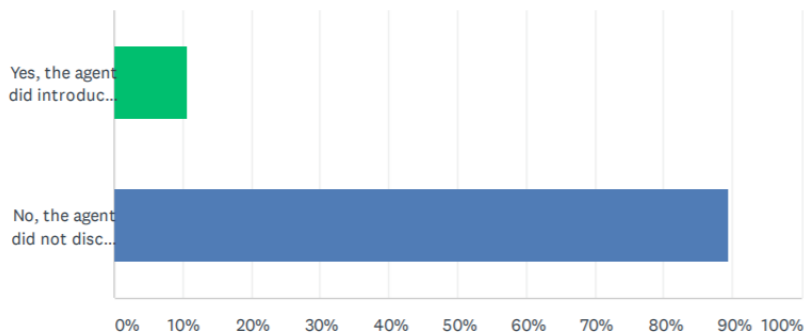
3. WHAT IS AN INDEPENDENT AGENT?

- 89.39% of agents didn't **explain** what an independent agent was.

— Or how it could benefit the prospect

Q8 Did the agent introduce the agency and explain the value of an independent agent?

Answered: 264 Skipped: 1

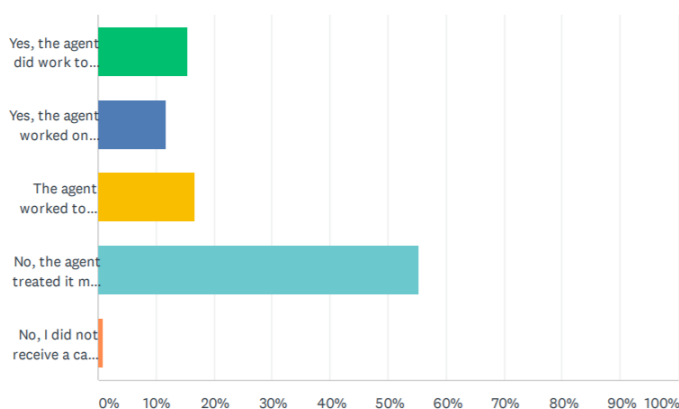


4. FIND THE CONNECTION

- 55.30% of callers stated the agent treated the call **“more like a transaction than a relationship.”**

Q9 During the call did the agent connect with you and find common ground?

Answered: 264 Skipped: 1

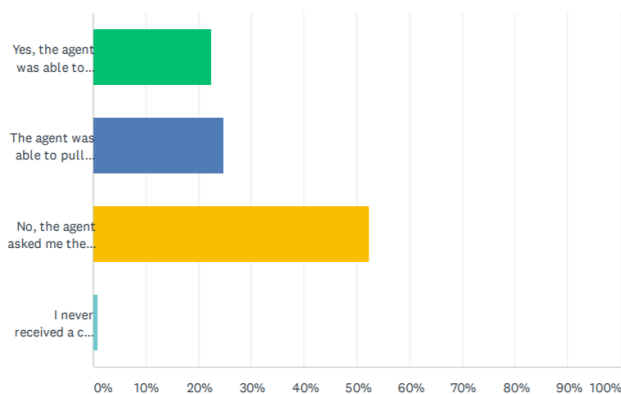


5. REDUCE THE CLIENT WORKLOAD

- 52.7% of agents asked the caller all the **questions**.

Q14 Did the agent verify information (as opposed to asking a series of questions)?

Answered: 264 Skipped: 1

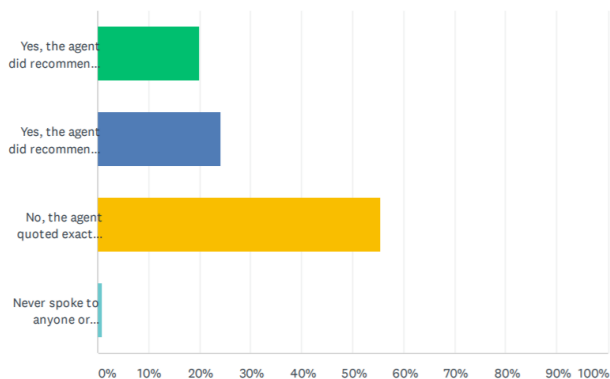


6. 4 & SCORE

- 55.5% of agents provided **exactly** what the caller requested.

Q17 Did the agent make any recommendations on other lines of insurance you may want to consider?

Answered: 263 Skipped: 2



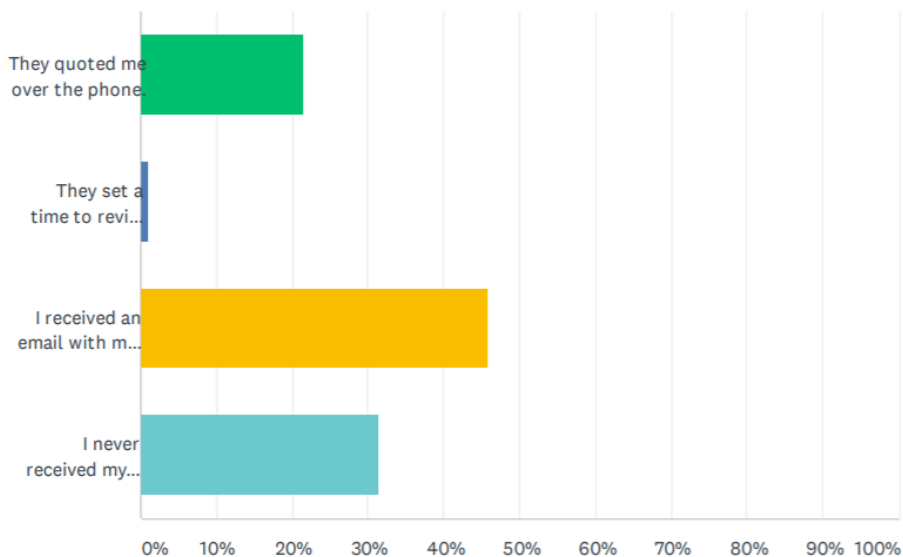
7. NEVER EMAIL A QUOTE WITHOUT A CONVERSATION

● Key Quote Stats:

- 21.59% quoted over the **phone**
- 45.83% were **emailed** a quote
- 31.44% **never** received a quote

Q19 How did you receive your insurance quote?

Answered: 264 Skipped: 1

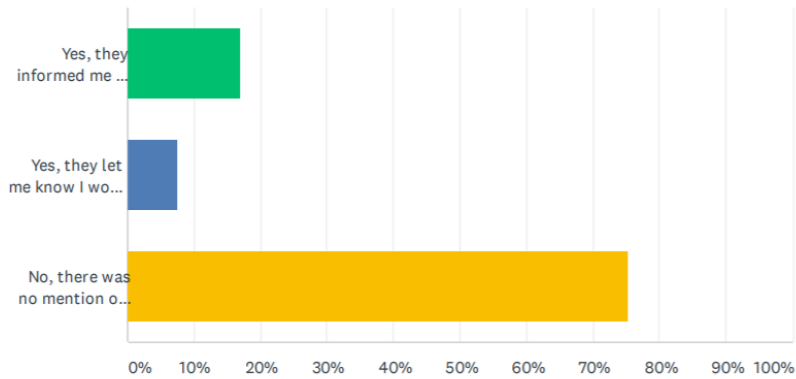


8. OPTIONS

- 75.38% of callers stated the agent didn't discuss **options**.

Q20 Did the agent set the expectation of how many quotes you would receive from them?

Answered: 264 Skipped: 1



9. ASK FOR THE BUSINESS

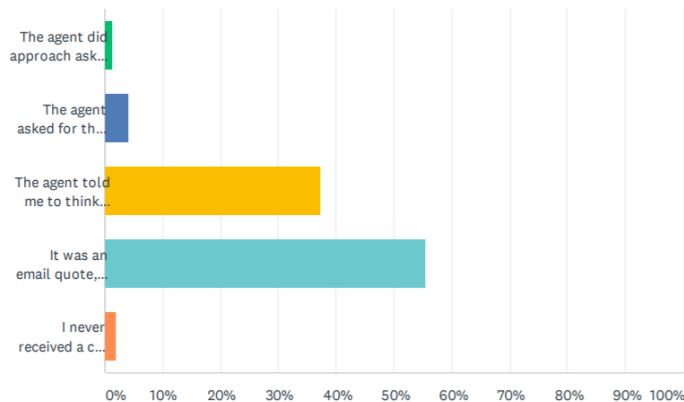
● Asking for the business:

- 55% of people got an emailed quote (hard to ask in an email)
- 37.31% said, "Think about it and let me know."

● 95% of the **work is done**. We need to close this.

Q28 Did the agent ask for the business or tell you to think about it?

Answered: 260 Skipped: 5



10. FOLLOW UP

● Follow Up Stats:

- 45.38% **one** follow-up
- 58.46% **no** follow-ups

Q30 Did you receive any follow-ups from the agent?

Answered: 260 Skipped: 5

ANSWER CHOICES	RESPONSES	
Follow-Up 1 Date and Email/Call	45.38%	118
Follow-Up 2 Date and Email/Call	20.77%	54
Follow-Up 3 Date and Email/Call	9.23%	24
Follow-Up 4 Date and Email/Call	6.54%	17
Follow-Up 5 Date and Email/Call	3.85%	10
Follow-Up 6 Date and Email/Call	2.69%	7
There was no follow up	58.46%	152