



# BD Training

## MODULE #2



# What you should know at this point

- ▶ How to communicate with a Gate Keeper
- ▶ How to properly transfer a call
- ▶ Your daily requirements
- ▶ How to properly gather information from a potential client
- ▶ What your base pay is
- ▶ How to listen and follow directions
- ▶ What time your breaks are and how long they are
- ▶ The basics behind your own style and the true sales styles



# LOB's and Who to ask for

- ▶ REAL ESTATE = Ask for the name on the lead
  - ▶ INSURANCE = Principal Agent
  - ▶ Mortgage = Loan Officer
  - ▶ FINANCIAL SERVICES = FINANCIAL ADVISOR/CFP (CERTIFIED FINANCIAL PLANNER)
  - ▶ IF NO INFO ON LEAD = I HAVE QUESTIONS REGARDING YOUR SERVICES
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# Each BD should have the following:

- ▶ Three Goals
  - ▶ Three Procedural Items to work on (i.e. learning how to transfer properly, how to dial out, how to disposition a call, etc....)
  - ▶ Basic knowledge on what we do here and what products we sell
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# Objectives and Expectations

- ▶ Consistency – The ability to stay on track and continue to use the same script and VM script on EVERY CALL!!
- ▶ Anticipation – Being able to determine what the customers objections will be and having the ability to overcome them and be completely ready for them at all times!!
- ▶ Taking control of the conversation – Having the ability to steer the conversation in the direction you need it to go to successfully get the transfer.
- ▶ LOB Hook's – One liner questions for each line of business you are calling so you can hook the potential client early in the call.
- ▶ STICK TO THE SCRIPT – STICK TO THE SCRIPT (This is VERY important as the script is designed to work and help you make money!!)



# What to bring to your weekly meetings

- ▶ Pen and Paper to take notes with
  - ▶ Your blue folder with all your training materials
  - ▶ A positive attitude
  - ▶ Willingness to absorb and learn
  - ▶ **MOST OF ALL A POSITIVE ATTITUDE!!!** What you say on the phone is impacted by your moods and how you feel. So **ALWAYS** remember to smile while your on the phone and ultimately have fun!! The more positive you are in your calls the better off you will be and the more money you will make!!
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# Role Playing

- When you are in your weekly BD training, the Trainer will be doing RP with all the agents
- Role Playing is when two individuals practice the script back and forth while taking turns being the agent and customer
- Proper role playing will not only help you by practicing the script but it will also help as you can have others critique you on what you are doing good and bad and what might need some work



# BAD HABITS

- Bad Habits consist of creating a pattern of things that are detrimental to your script/pitch and the ability to make sales.
- When you create a bad habit it can stick very quickly and it is hard to break bad habits.
- It is VERY important that you try your best to NOT create any bad habits as it can and will cost you money and depending on how bad the habit is, your job
- NEVER HANG UP ON A CUSTOMER. This can't be stressed enough. Make sure that you NEVER hang up on the client no matter how rude they are being. Simply inform the customer in a polite way what you are trying to do and take control of the conversation



# Different forms of communication during a call:

- **Tone:** Expresses your overall attitude and lets the person you are communicating with know how you feel. Three types of tones available. The first two are the only ones you should ever use and they are: the "late-night FM DJ" voice and the smiling positive/playful voice. The third tone of voice, which will always have a negative effect, is the direct/assertive voice. Using the assertive voice is like slapping yourself in the face while you're trying to make progress. Your counterpart will always be looking for the opportunity to push back
- **Inflection:** Is how you highlight and emphasize certain words and phrases. You want to use inflection to stress the importance of certain words and keep the customer engaged in what you are saying and trying to communicate.
- **Pitch:** Refers to how high or low your voice sounds. Higher pitched voices sound abrasive, while low deeper (late night Radio DJ) voices tend to be more soothing.
- **Rate:** The pace and cadence of your voice. Always speak slowly and clearly.
- **Pace:** Rate of movement or progress. Always speak slowly and clearly.
- **Cadence:** The measure or beat of your Sales Pitch's rhythmical flow.
- **Excitement:** Helps stir up emotion and increase activity on the call.
- **Volume:** How soft or loud you speak. People are often unaware that they speak too softly or too loudly.
- **Speak clearly:** Always speak clearly and in a positive, professional tone. We expect all team members to be positive and professional while on every call.
- **Word Choice:** What words we say and how we say the words is very important to communicating what we are trying to accomplish.
- **The power of listening:** Listen to your customer, always let them finish their thoughts. Good questions lead to the customer telling you how they want to be sold. Bird Dogs who listen twice as much make 5 times as much \$\$\$.



# In Conclusion:

- ▶ You have learned the different techniques how to communicate with customers
  - ▶ You have also learned how to successfully transfer calls to sales agents
  - ▶ You know what bad habits are and how to avoid them
  - ▶ You are now ready to take the test on the second lesson so you can move on to the more advanced Levels of Training materials!
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