Instructions & worksheet

4 STEP PROCESS:
- **Step 1 – Review the research**
- **Step 2 – Discuss the research**
- **Step 3 – Customize the script**
- **Step 4 – Monitor the results**

Step 1 – Review the research

Once you have decided who in the agency will be part of implementing this project, the first thing they should do is review the results of the research and the recommendations on their own.

The purpose of this review is to familiarize everyone with some of the concepts and reasons for implementing these changes with regard to how the agency would like to be responding to customers who volunteer the fact that they have been using the Internet as part of their insurance decision making process.

Step 2 – Discuss the research

After everyone involved has reviewed the research on their own, the next step is for everyone involved to get together and discuss what they've learned and their own "take-aways" from viewing the research.

The purpose of this is to help make certain that everyone is on the same page and resolve any hesitation, disagreement, misunderstandings or misconceptions about the research and what we're trying to accomplish with this project.

In addition, there will be practical considerations to discuss, such as when implementation will start and who can answer any questions or resolve any issues which might arise.

Step 3 – Customize the Script

After the research, and general outline of what we are trying to accomplish, has been reviewed and discussed by everyone involved, the next step is to customize the script. You will use the "reference script" as your starting point. This script can be downloaded from the website and contains a number of options to be chosen by those in your agency to customize it to best meet your specific needs and sales approach. You should customize the script in ways which best reflect your culture and how your agency works to meet the needs of your customers.

An important part of customizing the scripts is reading back what you have written to each other. Since these are new ways of taking calls with customers they will most likely sound unnatural it first. But practicing by reading them aloud to each other should help overcome any unnatural tendencies and help fine tune the actual wording you will use. When practicing, feel free to improvise both sides of the conversation since you'll need to be able to respond to different ways in which customers may address these same areas.

The scripts you develop should eventually be memorized. In the meantime, a cue sheet of key points can be referenced when responding to calls from customers

It is now time to implement the program.

Step 4 – Monitor the Results

As individuals in the agency begin using the elements of your scripst in their dealings with customers, they should keep track of the results they achieve. This could most easily be achieved by making brief notes of key points about the way in which customers responded to your conversation.

Of course, it's most important to note whether the conversation led to either a further inquiry, a sale or simply a generally positive response to the way in which agency staff is handling their questions or comments.

Next, allow 6-8 weeks to go by and then get everyone together for a meeting to review their notes and the overall impressions of those in the agency about the use of these new elements from your scripts. This meeting would also provide the opportunity to evaluate, and make any adjustments or changes that are necessary.

Good luck!