

# ELITE SALES TRAINING

## 2001

FAIA and the Sales, Marketing and Producer Development Committee proudly present our second annual, **limited-seating program** designed to train the best and brightest in our industry in the most elusive of skills... **SALES**.

Our program is designed to be complete training for young agents (this course is recommended for agents with less than 3 years experience in sales and less than 5 in the industry) who have a basic understanding of sales and need the foundation of a strong education to transform them into superstars in production. *We will be building selling machines!*

The specifics of the program are as follows:

**12 full days** training at FAIA Headquarters

Training is done 3 days at a time, quarterly

January 23 - 25, 2001

April 24 - 26, 2001

July 24 - 26, 2001

October 23 - 25, 2001

### **Lead Instructors:**

Jeanett Long, AIS, ACSR, CPIW

Lisa H. Harrington, CPCU, AAM, AAI

Several guest instructors, including other FAIA instructors and widely recognized industry speakers will be involved throughout the year. We'll use books and videos from some of the best in the industry, as well as role playing and practical instruction.

The Benefits:

- The class will be limited to conference room size so that the students will receive individual attention during and after the classes.
- The Elite Sales course builds accountability into the daily habits of the student. FAIA will have monthly contact with the students via e-mail.
- They will be required to report sales activities to FAIA, and that activity will be reviewed quarterly with the Elite Force.
- Friendly competition among the Elite Force is also encouraged. As a special incentive to complete the course, one of our Elite will be awarded an all expenses paid trip to a resort destination.

***This program has been approved by IIAA for the Associate in Insurance Production (AIP) designation.*** This designation will be conferred upon all students who complete the classroom work and reporting requirements of the Elite Sales Training course. The designation provides your agency and the student with higher credibility to the public and within the industry.

## • THE TWELVE DAYS •

### • DAY ONE •

#### *Perception, Power and Performance*

Personal discovery: How personalities affect the sale - how to recognize your client's buying style.

#### *Learning as a Lifestyle*

Be successful on a long-term basis, and stay on track for life. Persistence — not resistance.

### • DAY TWO •

#### *Time Management*

Learning to manage a salesperson's most critical tool: **time**.

#### *Goals and Reporting Requirements*

Goal Setting and Planning: an in-depth look at how to properly set sales goals.

### • DAY THREE •

#### *The Wedge*

Learn the secret one consultant has found to increase sales by helping the customer define perfection.

#### *Consultative Relationships*

Why "the close" is only part of the sale. How to gain long-term customers now!

### • DAY FOUR •

#### *Effectiveness as a Lifestyle*

Covey's Seven Habits of Highly Effective People Workshop, taught by an insurance agent who is Covey certified!

#### *Prospecting*

Risk Management basics, prospecting tools, suspects vs. prospects, tracking and reporting.

### • DAY FIVE •

#### *Marketing for Success*

Target Marketing, Selling to your Underwriter, Vertical Marketing, the Complete Sale.

#### *Managing the Sales Process*

Best Practices: Creating a Sales Culture, especially adapted for the new producer. How do the best become the best?

### • DAY SIX •

#### *Referrals!*

Learn from Roger Sitkin's popular methods to sell by referral only!

#### *Building Credibility*

More on Prospecting, plus Submissions, Ethics, Gaining Customer Confidence, Data Gathering.

## • THE TWELVE DAYS •

### • DAY SEVEN •

#### *War Stories*

Case analysis based on the student's actual experiences in the first half. What works?

Why?

#### *Technology as a Weapon*

How E-commerce will affect marketing of the future & what to look for now.

### • DAY EIGHT •

#### *The Interview*

How to find out what the customer really wants. How and when to walk away!

#### *Team Work*

We'll review a popular Miller Herman book to learn about account analysis involving the sales/CSR team. Identify Suspect vs. Prospect.

### • DAY NINE •

#### *The Presentation*

Proposals, rehearsals, polishing presentations skills - what works for various situations.

#### *The Negotiations*

A role-play game to learn how to negotiate with your underwriter and the client.

### • DAY TEN •

#### *Business Etiquette*

First impressions, networking, personal style, telephone manners - and why to bother.

#### *To Close or Not to Close*

When and how to use closes, tips from some of the very best - including the Zen of Zig.

### • DAY ELEVEN •

#### *The Customer as King*

Dealing with Tough Customers, Sales After the Sale, Listening Skills, Get Them to Come Back.

#### *The Triangle*

How the carrier relationship is the critical third leg of the stool, contract issues, more on accountability.

### • DAY TWELVE •

#### *Motivation for the Long Run*

Stress Management: What will work best for you to keep moving even when it gets tough? Attitude really counts!

#### *Your Sales Style*

Now that the multitude of sales methods has been explored, which will be your long-term plan?

• ELITE SALES FORCE •



APPLICATION FOR YEAR 2001 TRAINING

Please fully complete the application below, and attach a resume.

Cost to register is \$2,500, payable quarterly. This includes materials and books. We will require a commitment letter from the agency principal and the student. This letter should state that you understand that once you register you are responsible to complete the course and pay the full tuition. Please tell us why you want to be in the class. This course is designed to build upon itself and would be less effective if all twelve days aren't experienced.

Remember, this is a limited seating opportunity, so send your paperwork in today!

Name: \_\_\_\_\_ FAIA Member Number: \_\_\_\_\_

Agency: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_ (required)

# Of years in Insurance: \_\_\_\_\_ (recommended max: 5 years) # Of years in Sales: \_\_\_\_\_ (recommended max: 3 years)

Other Sales Training Courses taken:

Course Name: \_\_\_\_\_ Date taken: \_\_\_\_\_

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Name of Mentor/Manager: \_\_\_\_\_ (required)

E-mail address: \_\_\_\_\_ (required)

x \_\_\_\_\_  
Student signature

x \_\_\_\_\_  
Agency Mentor/Manager signature

Information on accommodations will be sent with your confirmation.

