

Sales Role Play Scenario

Objective: Influence the customer to come into the office to review his quote and also to purchase the policy.

Context: You receive an internet lead for a potential customer (Chris Owens, age 32). Call out to the internet lead to generate interest in a deeper conversation. Follow the sales process steps highlighted below:

- Ask for an appointment in office to discuss the quote
- Review the quote with the customer in the office
- Explain coverages and discounts as applicable
- Uncover any additional needs but plan to pursue those needs in a follow up meeting
- Close the sale and ask for referrals

Throughout your conversation, overcome any customer concerns while providing value statements relevant to the lead.

Begin the role play by calling the customer on the phone (no props needed). You can start with, "Hello/Hi, is this Chris Owens?" as if you were calling directly. Proceed to set an appointment in the office to go over the quote (phone call taking approximately 2-5 minutes). Your customer will have their back to you at the start of the role play while having the phone conversation. Once in the office, the customer will turn around in their chair as if in the office now. Continue with your sales conversation reviewing the quote and making the sale. (approximately 10-12 minutes).

Items to note/Resources:

- State minimum coverage is 25/50/25
- Attached is the prepared quote to review with the lead
- [Car Insurance Coverage](#)
- [Auto Discounts](#)
- [Simple Insights](#) from State Farm
- [About State Farm](#)