

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 coverage 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 over the phone taking the call from customer and setting an appointment in the office to go over the quote (approximately 2-5 minutes) Once in the office, review the quote and make the sale (customer agrees to purchase) (approximately 10 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](#)