

Customer Service Role Play Scenario

Objective: Through a service related transaction, influence the current customer to purchase a renter's insurance policy and promote excellent State Farm customer service.

Context: Lucas Lopez, a current customer stops by your office to make a payment on his auto insurance policy. He pays you with a check for the full 6 month premium. In the process of this service transaction, you uncover that he does not have any renter's insurance in place. Using the sales process highlighted below, engage in a dialogue that supports State Farm's customer-centric service mission.

- Recommend renter's insurance based on the customer's need
- Review the quote with the customer in the office
- Share the features/benefits that are relevant to the customer
- 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.

The role play begins when the customer knocks on the door to your office.

Resources:

- [Simple Insights](#) from State Farm
- [About State Farm](#)
- [Renters Insurance](#)