

# Dominating Your Agency in a Challenging Sales Environment

*“Hope is NOT a Strategy!”*

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**Presented by:**  
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**The Marvis Center**

*(Presentation based on excerpts from our Sales, Service, & Agent Workshops.)*

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## The Marvis Center Service Offerings

- ✓ **Agency Coaching**
- ✓ **Onsite Visits**
- ✓ **Trainings:**
  - Sales Coaching Workshop (3 Days)
  - Crash Course on Selling (1 Day)
  - Customer Service Training (1 Day)
  - “Writing 70 Life Apps in 70 Days” Workshop (1 Day)
  - Agent & Manager Training (2 Days)
- ✓ **Tools & Products:**
  - Everything DiSC® Assessment
  - Team Member Assessments
  - Individual Team Member Activity Tracking
  - Annual Agency Activity Tracking
  - Bonus Plans
  - Lessons-in-a-Box



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## **Differentiating Yourself – The “WOW” Factor**

## **The Right Team**

## **Training**

## **Approaches**

## Activities

## Inspecting What’s Expected

### Team Member Skills Assessment - Sales

Name \_\_\_\_\_

Date \_\_\_\_\_

**Directions:** Please complete the self-assessment, ranking answers from 1 to 4.

Valid Rating Choices:		1 = Low 2 = Some	3 = Moderate 4 = High	1 = Low 4 = High	1 = Low 4 = High
#	Tasks	Skill and Knowledge (competence)	Confidence that you can complete the task well (confidence)	Drive or interest in completing the task (motivation)	
1	Pivoting				
2	Handling customer's objections ( <i>"too much"; "don't need it"; "have it at work"</i> )				
3	Closing				
4	Conducting effective meetings				
5	Cold calling for quotes				
6	Getting referrals				
7	Utilizing the "Opportunities" link				
8	Presenting the Provisional Conversation™ from a service call				

### Team Member Skills Assessment - Service

Name \_\_\_\_\_

Date \_\_\_\_\_

**Directions:** Please complete the self-assessment, ranking answers from 1 to 4.

Valid Rating Choices:		1 = Low 2 = Some	3 = Moderate 4 = High	1 = Low 4 = High	1 = Low 4 = High
#	Tasks	Skill and Knowledge (competence)	Confidence that you can complete the task well (confidence)	Drive or interest in completing the task (motivation)	
1	Pivoting to Producers from service call				
2	Upping coverages				
3	Pivoting to bank products				
4	Getting clients to come in for insurance reviews				
5	Getting referrals				
6	Utilizing "Opportunities" link in the system				
7	Calming excited people				
8	Explaining how a serious claim is settled				

To purchase these assessments, visit our website at [www.themarviscenter.com](http://www.themarviscenter.com)

### Agency Assessment Survey

Name \_\_\_\_\_ Agency Name \_\_\_\_\_

**Directions:** With the focus on your Agency, please rate the following best practices on the 7 key elements of TEAM.

**Rating Options:** 1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree

FOCUS		
1	All team members can articulate the Agency's mission, vision and goals.	1 2 3 4
2	The team abides by a Code of Conduct.	1 2 3 4
3	Everyone's focus is to "win as much as we can".	1 2 3 4
TEAM		
4	Everyone plays "nice in the sandbox" with one another.	1 2 3 4
5	Team members support one another.	1 2 3 4
6	My team welcomes new members to the team, unconditionally	1 2 3 4
7	The team members are self-motivated and inspired to accomplish Agency goals.	1 2 3 4
TRAINING		
8	Each team member is aware of his/her strengths and weaknesses.	1 2 3 4

### Team Member Product-Knowledge Assessment

Name \_\_\_\_\_ Date \_\_\_\_\_

**Directions:** Please complete the product-knowledge evaluation, ranking answers from 1 to 4.

**Ranking:** 1 = Low Skill 2 = Some Skill 3 = Moderate Skill 4 = High Skill

AUTO				
The Marvis Center's Auto Conversation	1	2	3	4
Liability Conversation	1	2	3	4
Explaining Deductibles	1	2	3	4
Commercial Auto	1	2	3	4
ENOL	1	2	3	4
Pivoting to Other Products	1	2	3	4
FIRE				
Home	1	2	3	4
Renters	1	2	3	4

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