

Weekly Team Training - November 18

Meeting Purpose

To reinforce fundamental sales techniques and motivate agents to increase prospecting and follow-up efforts for the tax efficiency program.

Key Takeaways

- Simplify appointment setting: Focus solely on scheduling a 20-30 minute meeting, avoiding detailed explanations upfront
- Persistence is crucial: 80% of sales occur between the 5th and 12th contact; follow up until you get a clear yes or no
- Leverage support: Include experienced team members on calls to boost confidence and closing rates
- Address objections directly: Ask probing questions to uncover and address underlying concerns

Topics

Appointment Setting Basics

- Keep initial outreach simple and focused on scheduling a meeting
- Highlight key benefits: employee savings, additional benefits, company tax savings
- Example script: "If you could save about \$50,000 a year in payroll taxes, would you want to know about it?"
- Aim for a 20-30 minute appointment to explain the program in detail

The Importance of Follow-up

- 48% of agents never follow up after initial contact
- Only 10% of agents make more than three contacts
- 80% of sales are made between the 5th and 12th contact
- Persistence is key: continue following up until you get a clear yes or no

Handling Objections

- Ask probing questions to uncover true objections (e.g., "Help me understand your apprehension")
- Common objections include disbelief ("too good to be true") and perceived time commitment
- Address objections by emphasizing potential savings and simplifying the process
- Use analogies to put time investment in perspective (e.g., "Is an hour worth \$25,000-\$30,000 in savings?")

Leveraging Team Support

- Include experienced team members on calls to boost confidence and closing rates
- Utilize their expertise to handle difficult questions and objections
- Current success rate: Nearly 100% close rate on deals that reach the census report stage

Mindset and Motivation

- Reframe rejection as a step towards success
- Set clear goals and prioritize consistent action (e.g., make two new business contacts daily)

- Focus on the potential rewards: some agents are on track for seven-figure earnings next year

Next Steps

- Agents to prioritize making at least two new business contacts daily
- Implement a structured follow-up system, aiming for at least 5-12 contacts per prospect
- Utilize team support by including experienced members on calls when needed
- Focus on obtaining census reports, as this significantly increases closing probability
- For those unsure about follow-up strategies, forward prospect contact information to AI for assistance