Join us for this hands-on, one-day course as we focus on training new producers and/or telemarketers in the basic fundamentals of the sales process by understanding how to identify and build a database of prospects and obtain expiration dates in addition to:

► Setting up appointments for an experienced sales person to visit and ultimately close the sale
► Closing the business over the phone
► Traveling to a prospect and engage them in the selling process

Attendees will have developed the following skills:

► Solicit for new business
► Develop and qualify new leads
► Manage a database of prospects and customers
► Understand the sales process from ex-dating to appointment setting to closing the sale
► Understand pipeline management to attain sales goals
► Cross sell existing accounts

FUNDAMENTALS TO SUCCESS

1. **Fundamental One:** Building a database of prospects and insureds; obtaining expiration dates; setting up appointments for experienced sales producers to start the selling process.

2. **Fundamental Two:** Building upon phase one, training on how to close the business over the phone without the assistance of an experienced sales producer.

3. **Fundamental Three:** Building upon the foundation of fundamentals one and two, we will cover the basics of traveling to meet with prospects and engage them in the sales process through closing the sale. We will also develop a renewal process to keep existing business.

**Pre-requisite:** People attending this training will come into the program with the background and knowledge in their focus product(s) and industries or have already taken product training from one of our underwriting teams. We can assist with product and industry training.

View Dates & Register at:

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