

Niche Prospecting for Producers



New Hire Training (7-10 Hours)

The design of this program is to take someone new to the industry as a producer and teach them how to build a niche, prospect clients, negotiate, and close deals. It is interactive in nature and features various roleplaying scenarios.

Course Outlines

Agency 101

- ① Getting Your Feet Wet
 - ② Types of Agencies
 - ③ Roles in the Agency
 - ④ Internal Relationships
 - ⑤ External Relationships
 - ⑥ Communication Skills
 - ⑦ Effective Organization and Daily Habits
 - ⑧ Dealing with Interruptions and Taking Breaks
 - ⑨ Adding Value – What Separates You from the Pack?
 - ⑩ The Lifecycle of the Client
 - ⑪ Documents 7 Forms in the Renewal Process
 - ⑫ Your Personal Brand
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Niche Prospecting

- ① **Niche Prospecting Introduction**
- ② **Becoming a Niche Producer**
 - ✓ Prospecting Basics
 - ✓ Identifying Your Niche
 - ✓ Evaluation Your Niche
 - ✓ Developing Your Niche Expertise
 - ✓ Becoming a Niche Producer
 - ✓ Quiz
- ③ **Prospecting Management**
 - ✓ Leads Vs Prospects Vs Opportunities
- ④ **Generating Leads**
 - ✓ Lead Generation Method
 - ✓ keeping Your Pipeline Full
 - ✓ Generating Leads
 - ✓ Quiz
- ⑤ **Moving Leads to Prospects**
 - ✓ Overcoming Discomfort
 - ✓ Providing a Unique Selling Proposition
 - ✓ Making a Initial Contact
 - ✓ Scenarios - Cold Calling
 - ✓ Moving Leads to Prospects
 - ✓ Quiz
- ⑥ **Moving Prospects to Opportunities**
 - ✓ First Meeting - True Opportunities
 - ✓ First Meeting - Collecting Information
 - ✓ Scenario - Initial Meeting

- ✓ The Quote Process
- ✓ Moving Prospects to Opportunities
- ✓ Quiz

⑦ **Moving Opportunities to Clients**

- ✓ Preparing for the Proposal Meeting
- ✓ Proposal Meeting
- ✓ Scenarios - Proposal Meeting
- ✓ Following Up
- ✓ Delivering a Policy
- ✓ Moving Opportunities to Clients
- ✓ Quiz

⑧ **Conclusion**

⑨ **Final Exam**