



**FOX
SALES
CHALLENGE**

2019 FOX Sales Challenge

Professional Sales Organization of Temple
University

Liberty Mutual - Affinity Accounts Role Play

2019 FSC - Liberty Mutual ROLE PLAY

You have just been "put on plan" and are starting your third week as a Liberty Mutual Insurance Agent. As a new sales representative in the Greater Philadelphia Region, you are looking for ways to generate new leads into your pipeline. Liberty is known for offering a wide array of insurance products, stemming from auto and homeowners to life and pet insurance. Liberty has been around since 1912, "helping people live safer and more secure lives" for over 100 years.

During your first two weeks as a sales rep, you have primarily focused on prospecting and sourcing new leads to build your book of business. You recall from a training course you took that a great way to generate mass amounts of leads is through Liberty Mutual's Affinity Accounts Program. Day to day at Liberty has been a struggle since first starting, but you are staying strong, sales can be tough at first.

On a typical Tuesday, you received an inbound call from a customer looking for an auto insurance policy. As you were running through a quote, you realize that the customer on the other side of the phone is your old freshman orientation leader at Temple University, Alex Kramer. You and Alex begin to talk about what you have been up to since you have not caught up since you were a freshman at Temple. Alex mentions that he is currently working for Temple University's Human Resources in their Benefits Division. This piques your interest as you can leverage your relationship with Alex to obtain a meeting with Temple's Director of Benefits to discuss Liberty's Affinity Programs. Realizing this opportunity, you ask Alex if he would be able to pass along the Director of Benefits, Pat Clarke, information for you to attempt to set up a meeting to pitch Liberty's Affinity Program. Without hesitation, Alex provides you with Pat's phone number and email.

You quickly follow up with Pat via phone. As a new Temple University alumni, you are very excited to be possibly going back to campus. During your first phone call with Pat, Pat mentions that Temple is looking for ways to continuously provide value to their employees. Pat opened up to and mentioned that he has a lot of projects on his plate right now and is unsure he can handle another. Pat is very stingy on price and made it clear he does not want to spend any more money. Lastly, Pat told you that he wants to make sure Temple is fair when talking to all companies, he does not want it to seem like he is playing favorites.

Pat has given you a lot to chew on, but during your talk, Liberty Mutual's Voluntary Benefit Program came right into your head. Pat said he has 15 minutes to talk next week to hear about the voluntary benefit program that you mentioned via your phone call. It is imperative that you consult Pat on the benefits of an affinity partnership and get him to agree to another meeting where he/she can possibly sign a contract.

Objectives:

- Meet with Pat and build rapport
- Gain an understanding of Temple University benefit needs
- Present how Liberty Mutual can solve Temples Universities employee problems
- Get Pat to agree to another meeting where he/she will sign the contract to move ahead with Liberty

SCORE: _____

Salesperson: _____

Judge: _____

Each item is scored on a 0-10 scale with 10 being the best possible score and 0 being the absence of the skill or behavior.

15% **APPROACH:** (OBJECTIVE: Effectively gains attention and builds rapport)

____ Professional Introduction

____ Effectively builds rapport

____ Valid Business Reason (to smoothly transition to Needs Identification)

35% **NEEDS IDENTIFICATION:** (OBJECTIVE: Obtain a clear understanding of customer's situation in order to prepare a customized presentation)

____ Uncovers decision process (decision criteria, people involved in decision process, steps, timeframe, etc.)

____ Effectively determines relevant facts about the company and/or buyer

____ Effectively uncovers current needs, problems, goals of the buyer – reasons for change

____ Asked effective questions that brought to the buyer's attention what happens to the company or buyer when problems continue (i.e. Implication questions)

____ Gained pre-commitment to consider product/service

5% **PRODUCT/SERVICE PRESENTATION:** (OBJECTIVE: persuasively match your product's benefits to meet needs of the buyer)

____ Presented benefits based upon needs of the buyer instead of only features

____ Effective use of trial closes (follow-up questions to determine where the buyer is in the decision process)

5% **OVERCOMING OBJECTIONS:** (OBJECTIVE: eliminate concerns and addresses questions to the buyer's satisfaction)

____ Initially gains better understanding of objection (i.e. recognizes objection/concern)

____ Effectively answers the objection (i.e., responds to objection/concern)

____ Confirms that the objection is no longer a concern of the buyer

20% **CLOSE:** (OBJECTIVE: take initiative to understand where you stand with the buyer now and in the future)

____ Asked for business or appropriate commitment from the buyer

15% **COMMUNICATION SKILLS**

____ Effective verbal communication skills (active listening, clear and professional verbiage)

____ Appropriate non-verbal communication

5% **OVERALL**

____ Salesperson enthusiasm and confidence

____ Product knowledge

Comments:
