

Tips for Successful Remote Selling

Remote selling is growing in popularity, thanks in part to simple tools like virtual meetings, screensharing, and LifeSecure's online applications and e-signature options. These tips can make your next – or first – online sale a success. Interested in learning more? [Call 866.582.7701 to set up a one-on-one coaching session with one of our Regional Sales Consultants.](#)

Before the Meeting

Choose a virtual meeting program: There's no shortage of options when it comes to video conferencing. We work with agents who use ZOOM, join.me, GoToMeeting, AQ Conference, WebEx, Google Hangout, among others. Try them out and find one that works best for you. It's also a good idea to practice with a family member or friend before conducting a live meeting.

Find your target audience: Call existing clients to reassure them that their current coverages are secure and take the opportunity to review additional exposures and offer new solutions. You can also ask for referrals, call back former leads who went cold, or set up promotional emails and informational webinars to help market yourself and make prospecting part of your remote routine.

Set the appointment: Once you've found a date and time that works for your client, send them an email invite to confirm your appointment and let them know that you'll be sending them a screensharing link. You should also send a reminder email 15 minutes prior to the meeting and be online and dialed into the call at least five minutes ahead of the start time.

Practice makes perfect: Get comfortable with your presentation and online tools, including running quotes and taking applications. Just before the meeting, have all your materials available and websites open and minimized on your screen to help facilitate a more efficient meeting – your time and your client's time is valuable.

During the Meeting

Ask open ended questions: Developing a dialogue can be a challenge during a virtual meeting, but it's necessary to hold your client's attention and build a relationship. Keep your clients engaged by asking more questions, becoming a better listener and being prepared to answer their questions. Your clients don't necessarily want to listen to you – they want to be heard.

Ask your version of LifeSecure's 4 questions: Use questions like the ones below to engage your clients and position coverage as a solution to their concerns.

1. Have you had to move to a higher deductible health care plan recently?
2. How do you feel about having a high deductible?
3. What are your specific concerns about your health coverage and out-of-pocket costs?
4. What kind of unexpected medical event could cause you to have to pay your deductible all at once? (accident/hospital stay/critical illness)

After the Meeting

Follow up: Don't forget to touch base with your clients. If your call ended when you sent a completed application to your client for signature via LifeSecure's text or email option, a follow-up meeting can be an opportunity to answer questions about the online signature process and even walk through it together.

Be your own critic: Make evaluation part of your routine. Did you stick to your plan? What do you do well? What parts could use a little fine-tuning? Would other resources have helped? Evaluating each meeting is a great first step in preparing for the next one.

Top 10 Online Meeting Tips

1. Practice, practice, practice

There's less room for error in virtual meetings, as small mistakes and being unprepared are much more visible. Practice your presentation, test the virtual meeting technology beforehand and know your supporting materials.

2. Send a quick invite

Send your clients a reminder email – including the link to the online meeting – about 15 minutes prior to your meeting.

3. Call in early

This will give you a few extra minutes to get settled and ensure that you're ready when your clients log in.

4. Record the meeting

Recording your meetings can be a useful way to evaluate your presentation, ask colleagues or friends for feedback, and polish your meeting skills.

5. Share your screen

Screensharing is a must when it comes to online selling. Make sure you're comfortable sharing your screen and switching between resources. And be sure to close any windows that you do not wish to share with your client.

6. Know when to use the mute button

Background noise can often get in the way of clear communication. Depending on the size of your meeting, muting the audience audio may be necessary. Muting your own microphone at times can also help prevent background noise from interfering with your meeting.

7. Use your camera wisely

Video isn't always necessary – turning it off can sometimes increase the clarity of the call, especially when screensharing. It's also a good idea to have a camera cover on your laptop if you're not using video.

8. Be engaging

Keep your clients interested by asking engaging questions and truly listening to their answers. If you have multiple attendees, make sure everyone has a chance to contribute.

9. Use display names

This is less important when you're chatting with people you know well or in a one-on-one meeting. But if you're in a group setting, display names will help you remember names and see who is speaking.

10. Follow up

Keep your clients engaged after the meeting ends. Send a follow-up email to reinforce key points of your meeting, offer additional information and lay out any important next steps.

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