

Professional Marketing Associates'

MARKETPULSE

Marketing Tips and Topical Issues for Insurance Agents

Issue 2

PHONE SCREENER

Gatekeeper is a Resource

In commercial lines teleprospecting, the gatekeeper or receptionist, whose job it is to screen unwanted solicitations is potentially a great ally. Instead of seeing the gatekeeper as a wall between you and the decision-maker, you can think of her as a bridge.

On the Same Side

Remember that the gatekeeper is not only there to block time-wasting calls – her job is also to connect people with calls that matter. The gatekeeper is often a busy person with a sense of loyalty to her company and boss. If you help her understand that your call may have value to their business, she'll be inclined to help you get through to your target contact.

A Fountain of Information

The gatekeeper can also provide you with a vast amount of useful information. You just have to know how to ask for it. Being deceptive or devious is a bad way to get on anyone's side. But speaking with confidence and understanding puts people at their ease and earns their cooperation. You can often learn people's schedules from the gatekeeper by asking simple questions, thereby avoiding unnecessary rounds of telephone tag. If your target isn't available you can simply ask, "When is a good time to reach her?"

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(or get other facts), offer a guess and let the screener correct you instead of asking directly and getting stonewalled. "Is Mr. Collins the Controller?" No, he's actually the VP of Finance."

Empathize

When the receptionist is on a busy switchboard and you hear calls ringing in the background offering to hold while she takes care of others can be a considerate and effective way to earn her cooperation.

Act Like You Belong

Some words or phrases convey an immediate sense that your call may be of the solicitation (hence to be screened out) variety. It's usually more effective to say, "This is..." when you're introducing yourself than "My name is..." You'll sound less like you're selling something.

Show Appreciation

Like most people, gatekeepers want to be helpful and feel appreciated. You can establish rapport with the receptionist by using phrases like, "Maybe you can help me..." or "Do you mind if I ask your opinion about the best time to reach so and so..." ☎

Professional Marketing

Associates, based in Amherst, Massachusetts provides high-quality teleprospecting and other marketing support for insurance clients countrywide. To discuss ways telemarketing can benefit your agency call Jonathan Peters at 800-783-2302

CLIENT PROFILE

A \$60 million agency, headquartered in the Midwest, contracted with PMA over a year ago to generate leads and appointments for seven commercial lines producers - each concentrating on specific industries. PMA created separate phone approaches for each producer and began building a lead database and developing appointments for the sales team.

"Feedback from agents has been very positive", commented the agency President, after the first two months of calling, "We're getting back good info - people are receptive and understand the agents specialization. And you've gotten us some nice appointments"

The agency soon expanded the program to include appointments for their fee-for-service division that provides corporations with a menu of services including claims management and HR consulting. PMA works closely with the agency Administrator who mails their printed brochures to qualified prospects prior to PMA calling for appointments at renewal time. PMA also provides the agency with reports breaking down the leads by producer. ☎