

Call Clinic Culture Tips

1. Agents can use PAC Script to confirm PACs
2. Handling objections from each call using the script
3. Should make calls continuously through the Map tab in EPIC
4. Use the Agency Owners Qualified Salesgenie Leads Dashboard
5. SAs and agents are calling together

Metrics

1. Each agent should confirm 100 PACs each week in order to hit 100 business
2. Agents will need to export 150–175 Salesgenie Leads in EPIC in order to confirm 100 new PACs
3. On average, agents can complete 20 new PACs an hour using the Map in EPIC

Coaching Tips

1. **Suggest everyone follows the script**
 - If the name of the Decision Maker is not available
 - Ask: “Who makes the decisions for the Company?” or “Who is the Owner of the Company?”
 - When walking into the business, it is always easier to start with the Owner/CEO/President and have them walk you to whom they have chosen to make those decisions
2. **Everyone in Call Clinic should be continuously calling**
 - Anyone who is not calling should be removed from the room
 - SAs should be calling right next to their agents
 - ADs should be listening to everyone and creating competition using the Qualified Salesgenie Leads Dashboard
 - Customer service, enrollments, deduction calls, etc. should be completed outside of Call Clinic
3. **Consider refreshing the Qualified Salesgenie Leads Dashboard every hour**
 - Using the Qualified Salesgenie Leads Dashboard will help hold everyone calling accountable to hitting their objective and allow management to see who needs help
 - Running contests will encourage excitement and commitment to hit objectives and drive competition
4. **Help agents handle objections and identify business that they may need to ask more questions for**
 - Make sure agents know how to handle the objections by considering the suggested script and leading the conversation on the call
 - When agents are calling blue-collar business in rural areas (landscaping, contractors, construction, plumbing, AC/heat, electric, etc.)
 - After confirming the address, ask: “Is this a home address?”
 - If the business seems to be corporate
 - Ask: “Is this your main corporate headquarters?”