

THE

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# CSR SALES HABIT<sup>TM</sup> BUILDER

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## PROGRAM

*for Insurance Industry Customer Service Representatives,  
Account Managers, and their leaders*



**“Very upbeat  
and inspiring!  
I feel *invincible*  
after meetings!”**

HUB International, CSR

*Trusted since 2002 by elite independent insurance agencies and the companies that serve them*

CHUBB®

The Hanover  
Insurance Group®

Safeco  
Insurance  
A Liberty Mutual Company



BIG i™

PIA  
PROFESSIONAL  
INSURANCE  
AGENTS

HUB  
International

Gallagher

SIAA®

# Tackle the single biggest obstacle to improving CSR sales outcomes: habituating strong sales behaviors.

After an optional on-site kickoff event CSR's get a monthly dose of live, remotely delivered, easily digestible lessons customized to your agency.

**They learn to cross-sell, up-sell, account-round, and close more business, more confidently, and more frequently.** Plus, owners and managers get private, coach-the coach sessions to ensure a successful implementation – all without leaving the office.

## Designed for success

**We make resolutions. We devise plans. We fire up and then, often, we fizzle. It is human nature.** To keep any fire burning you must feed it. Using group wisdom, high interactivity, and quality content, your service and management team become active participants in a focused and enjoyable growth experience. You get engaging, live, web-video coaching that provides three keys to turn behavior change into the powerful habits that drive profits:

- ✓ **Desire** (buy-in)
- ✓ **Means** (skills)
- ✓ **Accountability** (repetition, measurement, support)

Through group discussions, role plays, and customized worksheets, participants grow to a new level of competency and commitment to boost their sales effectiveness.

# THE CSR SALES HABIT BUILDER™

PROGRAM

***“Sheldon’s work helped my team nearly double their closing ratio. This transition was much more effective than I ever thought possible.”***

*Peter Whalen, Owner  
Whalen Insurance*

***“We’ve already seen our asks increase by over 200%. Quotes and closes are up, and we are thrilled with the results!”***

*Barbara Targum, Vice President  
Dwight Rudd Insurance*

***“By the last session, 80% of the calls turned into new business and we saw an increased growth in coverage up sells as a TEAM.”***

*JoAnne Finck, Vice President  
Finck & Perras Insurance*







**“Over the course of his coaching, we saw a 73% increase in net new PL policies.”**

*Bob Borawski, President, Borawski Insurance*

## Your CSR Team Sessions help staff to learn and practice agency-specific skills.

- ▶ Consistently and comfortably transition in-bound customer service calls into sales conversations.
- ▶ Turn renewal review calls into account rounding and up-selling opportunities that are welcomed by clients.
- ▶ Handle sales objections without sounding pushy or manipulative.
- ▶ Boost close ratios among prospects calling to shop and compare.
- ▶ Generate more customer and interdepartmental referrals among commercial lines, personal lines, life, health or employee benefits
- ▶ Reduce re-marketing every time a customer says, “Shop for me. My rate went up!”, without worrying about losing the customer.
- ▶ And most important of all, eliminate fear-based, limiting beliefs. Instead, help your CSRS develop an integrated practice of serving and selling based on integrity, intention, and their language in any moment of choice.

## Your private, Coach-the-Coach Sessions help you make changes stick between CSR calls.

Get insight, support, and techniques to:

- ▶ Keep sales efforts from fizzling out.
- ▶ Lead staff sales-huddles that are disciplined, productive, focused, and fun.
- ▶ Measure and manage the behaviors that drive outcomes instead of only the outcomes themselves.
- ▶ Inspire excellence without always resorting to cash, which inevitably loses its power to drive lasting change.
- ▶ Avoid the sabotage that managerial demands inevitably visit upon good intentions, fresh sales ideas, and team accountability.

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**“Cross selling conversations increased 36% and we more than doubled sales from cross selling over the same period last year.”**

*Jules Gaudreau, Owner  
The Gaudreau Group*

# How it works

Get inspired intention, steady attention, and disciplined implementation over time.

**Every month, get two high-impact coaching experiences that will boost sales.** Following your optional on-site, kick-off event, the first coaching experience is an agency specific sales training module and worksheets delivered to your CSR's during a 45-minute, live, video call. Second, get a coach-the-coach call to hone lessons specific to your agency, provide management tools, discuss results or roadblocks, and make sure that the training sticks.

**All calls are recorded and archived** so that your agency has an ever expanding resource library for absent employees, independent study, or continued reinforcement.

**100% happiness guarantee.** If after the initial session you don't believe the program will deliver on its promised results, you get a full refund but can keep all program materials.

*"Without a doubt, the very best and most effective program of its kind."*

*Angela M. Pickup, Former EVP - Personal Lines, Hub Intl New England*

## About Your Professional Sales Coach **J. Sheldon Snodgrass, MBA**



*Sheldon has spent thousands of hours coaching soldiers, skiers, white water rafters, and athletes of all ages. He's also coached hundreds of insurance agencies and thousands of CSR's in collaboration with dozens of national and regional carriers, state associations, and industry partners.*

*Sheldon's energetic, emotive and entertaining style help translate our best intentions into the spark of action. His masterful blend of behavioral science book-smarts with industry specific street-smarts provides the recipe to help your service team sell more while they serve better. Sheldon's powerful coaching flows from two guiding principles: lovingly meet people where they are and ignite their own desire to improve.*

## Get Started

Call Sheldon at 413-244-2294  
or email [Sheldon@SteadySales.com](mailto:Sheldon@SteadySales.com)

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