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What are the Right
Sales Questions to
Understand a Client?

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Are You Aware?

When meeting with a potential client, you may be tempted to treat it like a job interview. You'll ask questions, they'll ask questions, and maybe you'll both be pleased with the answers. But if you really want to understand a potential client and identify their needs and desires, you don't want to rely on interview questions.

Instead, begin a conversation. Before potential clients will feel comfortable sharing personal information (which helps you identify their unique needs), they need to be engaged through the right questions.

Are You Prepared?

First get to know the client.

- Can you tell me a little about your background and/or the company's background?
- What insurance needs do you feel are most important for a provider to meet for a client?
- Can you share a little about the company's future goals and strategic plans?
- What is one thing right now that would make running this business easier?

Recheck during your pitch.

- Would you like me to explain this in greater detail or in a different manner?
- Is there anything in the foreseeable future that may affect the choices you make regarding an insurance provider?

Are you being courteous, caring and prompt with answers?

Have you been quick and consistent to respond when they needed you?

Have you been genuinely concerned with their needs, asking specific questions?





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- Do these budget options meet your expectations?
- What features of our products would you like to compare?
- Are there any other decision makers I need to meet with?

Restate your position and reframe what you've understood about the client.

- How do these options sound to you?
- Is there anything we can do to better suit your needs?
- What are the next steps you would like to take?

What Next?

Brainstorm a list of questions for your next potential client. First, jot down everything you know about the client. This may include:

- Industry type and company size
- Current type of employee
- Company mission statement or belief (usually on their website)
- Point of contact
- Concerns already expressed

Next, determine the questions you can bring up in conversation that will help you better understand this client's needs and aspirations. Try to make them specific to what you already know about this lead. When the conversation begins, engage first in some small talk to establish some common ground. This will set both you and your client at ease.

Often, in conversations, questions are answered before they're even asked, especially if a client is comfortable sharing. As you listen and process a client's answers, be aware of the questions you no longer need to ask.



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What are the Right Sales Questions to Understand a Client?

Remember, as you talk with your contact, your primary goal is not to close a sale but to begin a relationship.

Berkley Industrial Comp Difference

Berkley Industrial Comp seeks to offer a complete, unique approach to workers' compensation benefits for our clients. Because we understand the nuances and intricacies of high hazard industries, we have assembled top quality professional teams to aid in every step of the workers' compensation process.

- For safety and risk management, our clients benefit from the instruction, expertise and assistance of our Risk Assessment Management and Prevention (R.A.M.P.) team experts.
- If an employer deals with an injury claim due to substance abuse, we are there to provide the best quality outcome through our OnPoint program.
- More than a claims department, our RESOLUTION team, consisting of medical and claims experts, offers personalized assistance to each of our clients.

Through our unique approach, we seek to build trusting, long lasting relationships with our clients. We share a common goal with all our clients—the desire to keep employees safe and on the job. At Berkley Industrial Comp, we are more than just an insurance company. We are a family and we take care of our own.

Berkley Industrial Comp is pleased to share this material with its customers. Please note, however, that nothing in this document should be construed as legal advice or the provision of professional consulting services. This material is for general informational purposes only, and while reasonable care has been utilized in compiling this information, no warranty or representation is made as to accuracy or completeness.

