



CONSULTATIVE SELLING:

5 Steps to go from Sales Rep to Sales Champ

WIN MORE DURING AEP 2021

1.DISCOVER

Learn about your prospect

Consultative selling begins with listening to and learning from your prospect. Engage in real conversation about what they need and want from their plan. Let them do most of the talking. Only ask questions to gain a deeper understanding or encourage them to continue. Intent listening will prepare you to assist them in choosing the healthcare plan that is right for them. You want your prospect/client to feel like they are in control, and you are there for them—not the product.

2.INFORM

Educate your prospect

In truth, you will repeat this step often throughout your engagement. Each encounter with a prospect should be an opportunity to empower them. Offer complete, honest answers to their questions. Be open with prospects and share your knowledge. Show them they can trust you to make insightful and reliable decisions when advising them. When it comes to closing the deal, your prospect should feel they are making a well-informed decision.

3.INQUIRE

Look for the best solution(s)

Once you have a full understanding of your prospect's needs then you can begin to review the your contracted plans. Find a couple of options that are most suitable for your clients wants and needs. Prepare to answer questions such as why you made these choices and how they will be beneficial. Give them as much information as you can to support them in making their decision. After all, it is their decision to make. You're there to be consultative, not authoritarian.

4.OFFER

Present your recommendation(s)

Now is the time for your “pitch.” However, you should continue to keep things as conversational as possible. Show the prospect that you listened with a personal presentation of the plan(s) you chose. A general overview is necessary, but go further and highlight each of the features that make it the best choice for them. Let your prospect know that they can and should ask questions as you make your suggestions. Keep the consultative frame of mind. This is still about finding the best product for their situation.

5.FOLLOW-UP

Always stay in contact

Consultative selling doesn't end after your prospect has become a client. Your work as their champion never ceases. Check-in once their plan takes effect to see if they're satisfied. If not, inquire about what is causing their frustrations. Offer an assurance that you will fix these issues in the next AEP. Continue to drop into your client's inbox and mailbox throughout the off season to foster a rapport. You want your clients to think of you as their sales champ long after you've helped them find their plan. Not only will this make them return clients, it will also support their reference for you.

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