

Participant Guide

Session 3: Getting the Customer's Agent Information

Use this to engage more fully as you listen to this session. Pause the video. Answer these questions as the session unfolds. Dig in.

1. How many jobs have you done so far this year for residential homeowners?

2. How many of those do you not have the homeowner's Insurance Agent name and company?

3. What about calling your past customer to gather the Agent Information scares you or makes you uncomfortable? Tell me about that.

4. What stood out to you from Gerry's teaching about the Customer Conversation?
