



## Quality Conversations: Our Favorite KPI

Great conversations are what drive real results in our agency—not just quotes or quick chats. When our producers focus on quality over quantity, they build trust, uncover real needs, and drive cross-sells that actually stick. Here's how we define a 'quality conversation'—and how you can start using this as a high-impact KPI in your own agency.

### The 3 Elements of a Quality Conversation

#### 1. Qualify the Prospect

Before diving into quotes or coverages, we make sure the client is a good fit for how our agency operates. That means asking whether they're comfortable with our communication style, use of service centers, and our emphasis on proactive coverage reviews.

Try asking:

- "We use texting, service centers, and we do regular coverage reviews—does that style of service work for you?"
- "We're big on making sure your policy works for \*you\*—are you okay with us taking a little extra time to dig into that?"

#### 2. Ask "Poke the Bear" Questions

Too many producers fall into the order-taker trap. A great conversation uncovers pain points or gaps the client may not even realize they have. That starts by asking better questions—and listening closely.

Start with:

- "What has you shopping for insurance today?"

If they say 'price', follow up with:

- "Is there any other aspect of your insurance you're not happy with or looking to improve?"

Then use mirroring and labeling techniques:

- "Sounds like you weren't expecting that renewal increase..."
- "It seems like you might've had a bad experience with your current agent?"



### 3. Push for Coverage & Cross-Sell

Once the client's needs are on the table, we don't just match the old policy. We show them what better coverage looks like—and where they may have gaps.

Use phrases like:

- “Would you like me to walk you through what coverage could look like if we built this policy around your actual needs, not just your budget?”
- “Let's make sure we're protecting more than just your car—do you have a current umbrella or life policy?”

### Putting It All Together

At our agency, this is more than just a checklist. Every team member knows what a quality conversation looks like. We track them. We coach to them. We celebrate them. And we believe this KPI reflects our core values: Clarity, Compassion, and Compete.

Ready to define your own version? Start here:

- ☐ Define your 3 checkpoints for a quality conversation
- ☐ Build a simple checklist or script for your producers
- ☐ Celebrate examples of great conversations in team meetings