



# The Producer Opportunity: Selling Virtually in our New Environment

*Jenn Walsh, GenuineShift*



**30**  
**YEARS**







# Overview Effect





*The*  
**BENEFITS  
LADY**

**BROKERS & BENEFITS SOLUTIONS  
HELPING YOU GROW  
AND MINIMIZE STRESS**

(with candor and a dose of humor 🎉)





# Choices & Distractions



# SIMPLIFY — INTEGRATE — PROGRESS

while you Shelter-In-Place

CLEAR FORM

**SIMPLIFY — INTEGRATE — PROGRESS**  
while you Shelter-In-Place

**Client Conversation Audit**

Client: \_\_\_\_\_ P&C  Benefits   
Date: \_\_\_\_\_

Internal Attendees Only  External (Included client and/or carrier)   
Who facilitated the meeting? \_\_\_\_\_

What was the primary issue?  
\_\_\_\_\_

What are the next steps in this situation with this client?  
\_\_\_\_\_

3 things I observed/learned from this discussion (technical and/or client management skills):  
💡 \_\_\_\_\_  
💡 \_\_\_\_\_  
💡 \_\_\_\_\_

Terms or concepts I need to research further:  
📖 \_\_\_\_\_ 📖 \_\_\_\_\_  
📖 \_\_\_\_\_ 📖 \_\_\_\_\_  
📖 \_\_\_\_\_ 📖 \_\_\_\_\_

Could this apply to another client or prospect? What are your next steps?  
#1 \_\_\_\_\_  
#2 \_\_\_\_\_

Notes taken by: \_\_\_\_\_

**SIMPLIFY — INTEGRATE — PROGRESS**  
while you Shelter-In-Place

**Technical Training Notes**

Internal  External  P&C  Benefits  Other (i.e. Skills Training)

Host: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date Recorded: \_\_\_\_\_

What problem is this solving? For whom?  
\_\_\_\_\_

**Could this apply to another client or prospect? What are your next steps?**

#1 \_\_\_\_\_  
#2 \_\_\_\_\_



## *Why are you here?*

**You're an Insurance Professional  
who has accepted this fact:**

---

The business cycle continues  
as we shelter-in-place and  
return to “normal”



*You're ...*

**All dressed up. Nowhere to go.**





OPTION  
***01***

## Frustrated

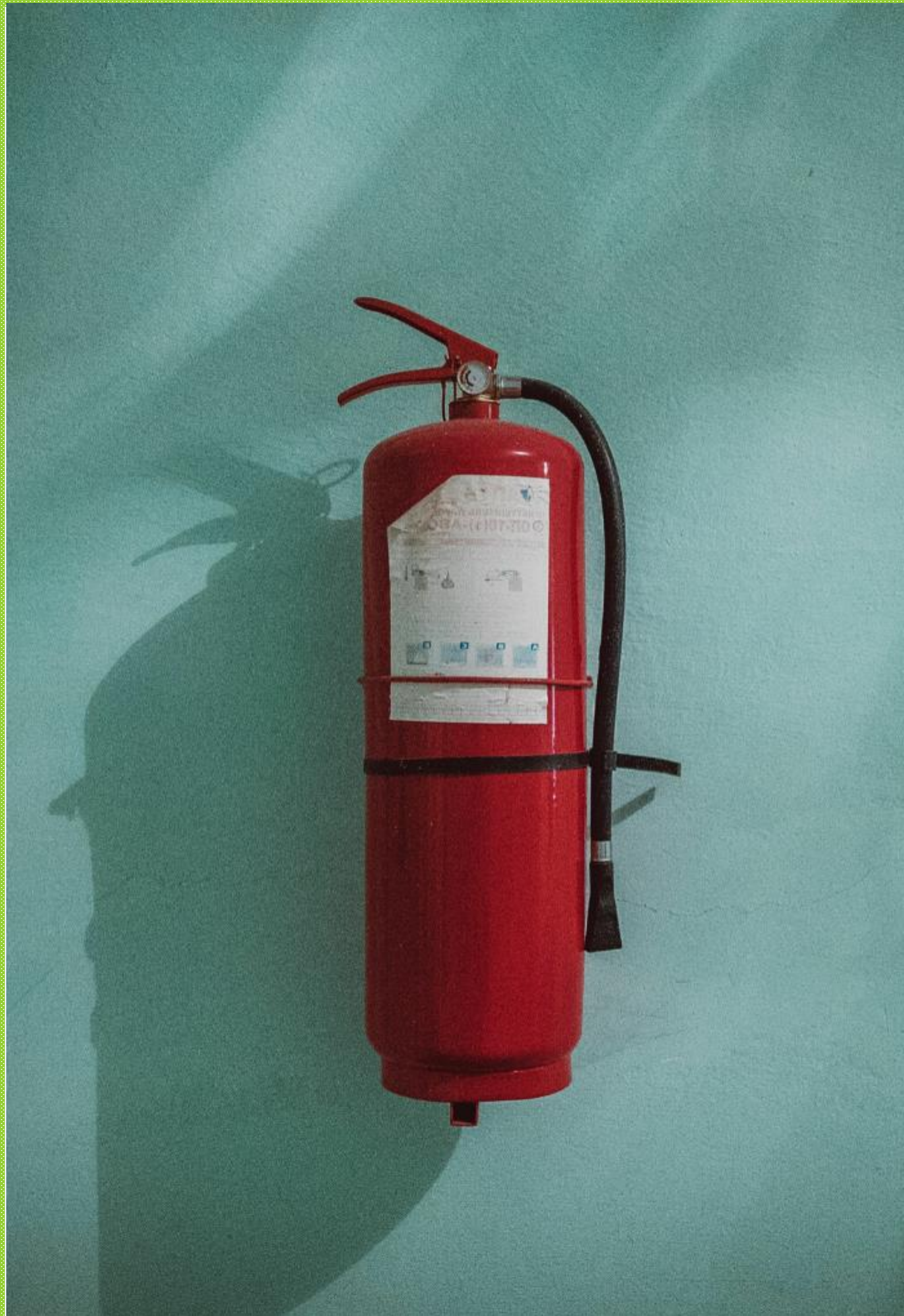
Passive - the acceptance of something undesirable but inevitable; voyeur

OPTION  
***02***

## Empowered

Enterprising – showing initiative and resourcefulness; open eyes & mind





*An important reminder*

**The firefighting practice leader**





*An important reminder*

**Shelter-in-place can't be your mindset**





Can you imagine?



*But, but Jenn...*  
We're a face-to-face business

*Physical vs. Virtual*



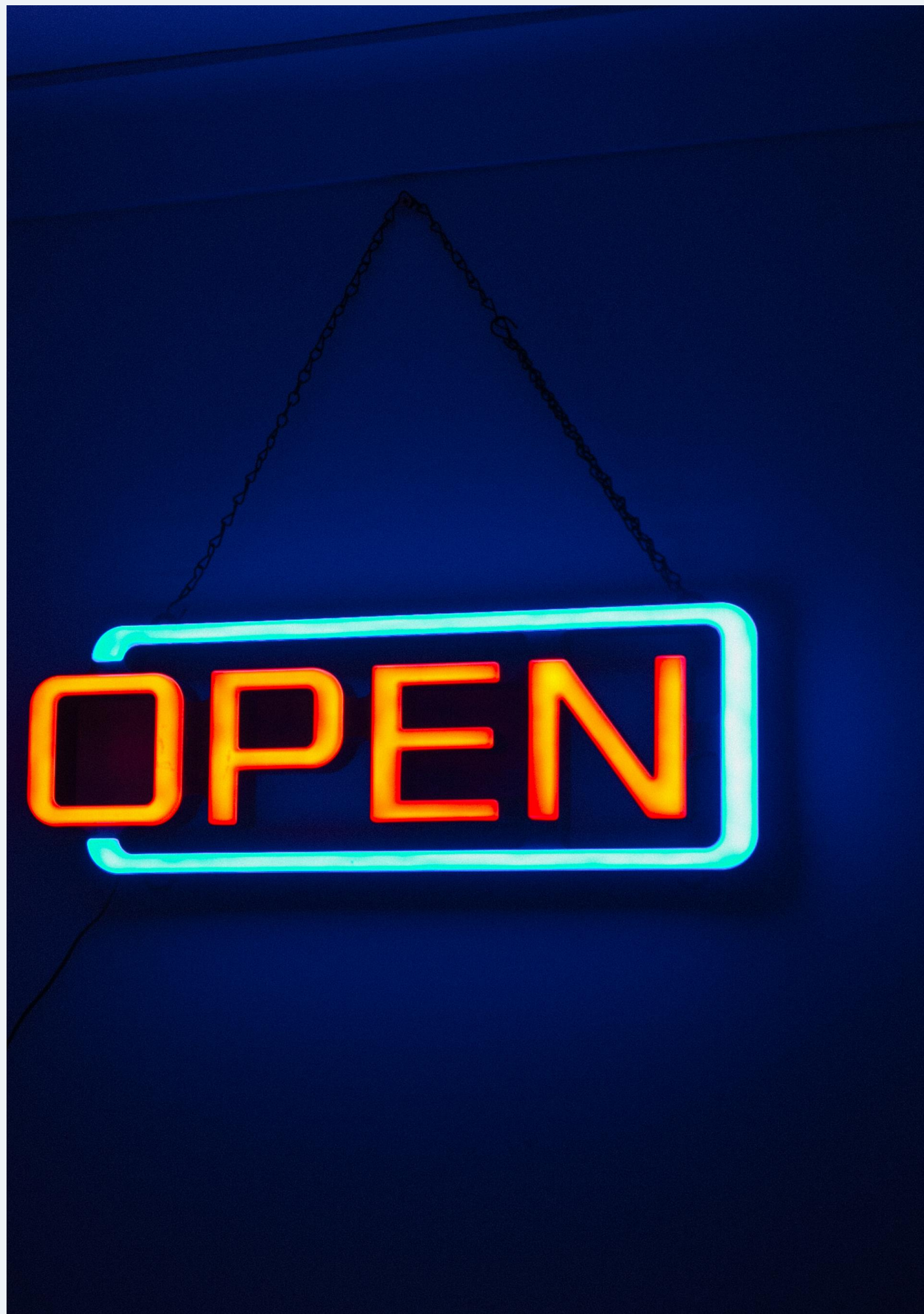




BUSINESSINSIDER.COM

**Invite a llama or goat to your next corporate Zoom meeting or video call for under \$100**





- You're essential
- Initiate & nurture
- Learn & lead (prospects hire you to be led)
- Deals are getting done
- Narrow focus (expertise)
- Expand territory (funnel)





## Conversation Starters

Coffee: Ship it - Grounds & Hounds



## Entertainment

Virtual Happy Hour, DJ or Magician

Drive-in for their family or your group



## Community Involvement

Local schools or businesses



## Next Stage Discussions

Walking meeting

Virtual lunch





- Refreshed Industry Associations
- Town Halls & Focus Groups
- Creative business collaboration
- Summits
- Social Media (transparency)

A magnifying glass with a dark frame is positioned over a textured, light brown surface. The text "trends to watch" is written in a bold, black, sans-serif font, centered within the lens of the magnifying glass. The background of the entire image is a solid, vibrant green color.

**trends  
to watch**





*I'm not asking you to try anything that I'm not  
testing and studying.*

**From my dining room in a pandemic.**



Be specific. Have some fun.

In addition to my client work...



- ✓ *Example #1:*  
Account Executive Academy
  
- ✓ *Example #2:*  
Baffled by Brokers Series
  
- ✓ *Example #3:*  
Broker Selection Process





## Benefits Brokers

*Firms of all sizes nationwide*

- Communicate consistently
- Make it easy to be found
- Segment: What would Jeff do?
- Ask: The 1, 2, 3 email
- Adapt “designer” mindset:
  - Test, refine, test, refine
  - Use technology
  - Is there a call to action?
  - Measure responses





## Benefits Solutions

*Legacy Carriers & New Entrants*

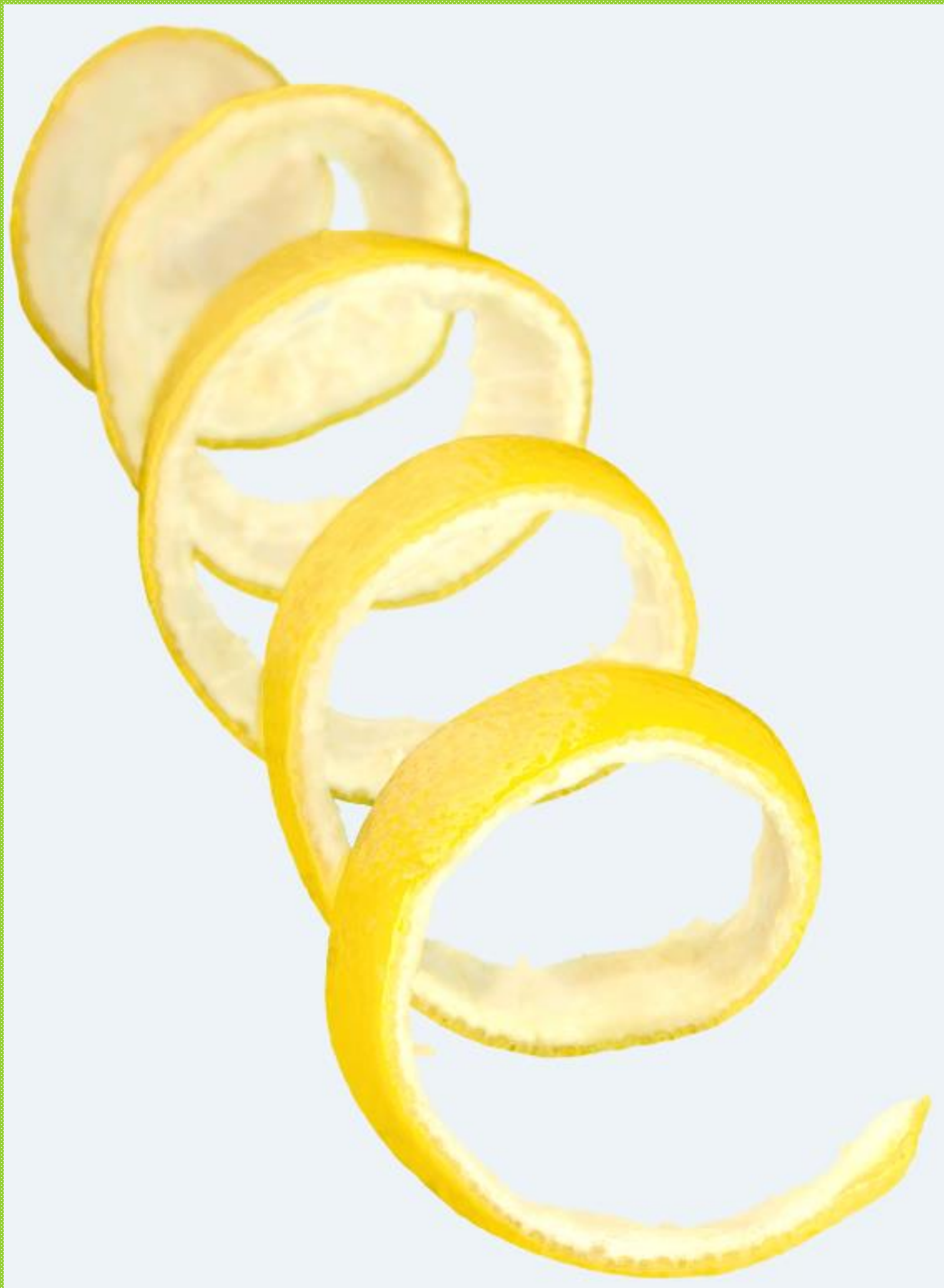
- Pick a niche
- Don't overthink/build
- Test promotion (weekly email/LinkedIn)
- Seek prospect feedback
- Repurpose content
- Make some mistakes





- ✓ Virtual Broker Selection Process
- ✓ *Who?* Qualified member firms  
6 contenders + incumbent
- ✓ *When?* March and April  
All parties stayed on schedule
- ✓ *What?* 100% Virtual  
Discovery Session & Finalist Meeting





*“It was good not to have other distractions. This kept the whole team focused on our priorities.”*

**The client’s observation**



Let's discuss





- Earning “like & trust”
- “You are what you do”
- They know nothing
- Simulate the consulting experience
- Be intentional
- Make every word count





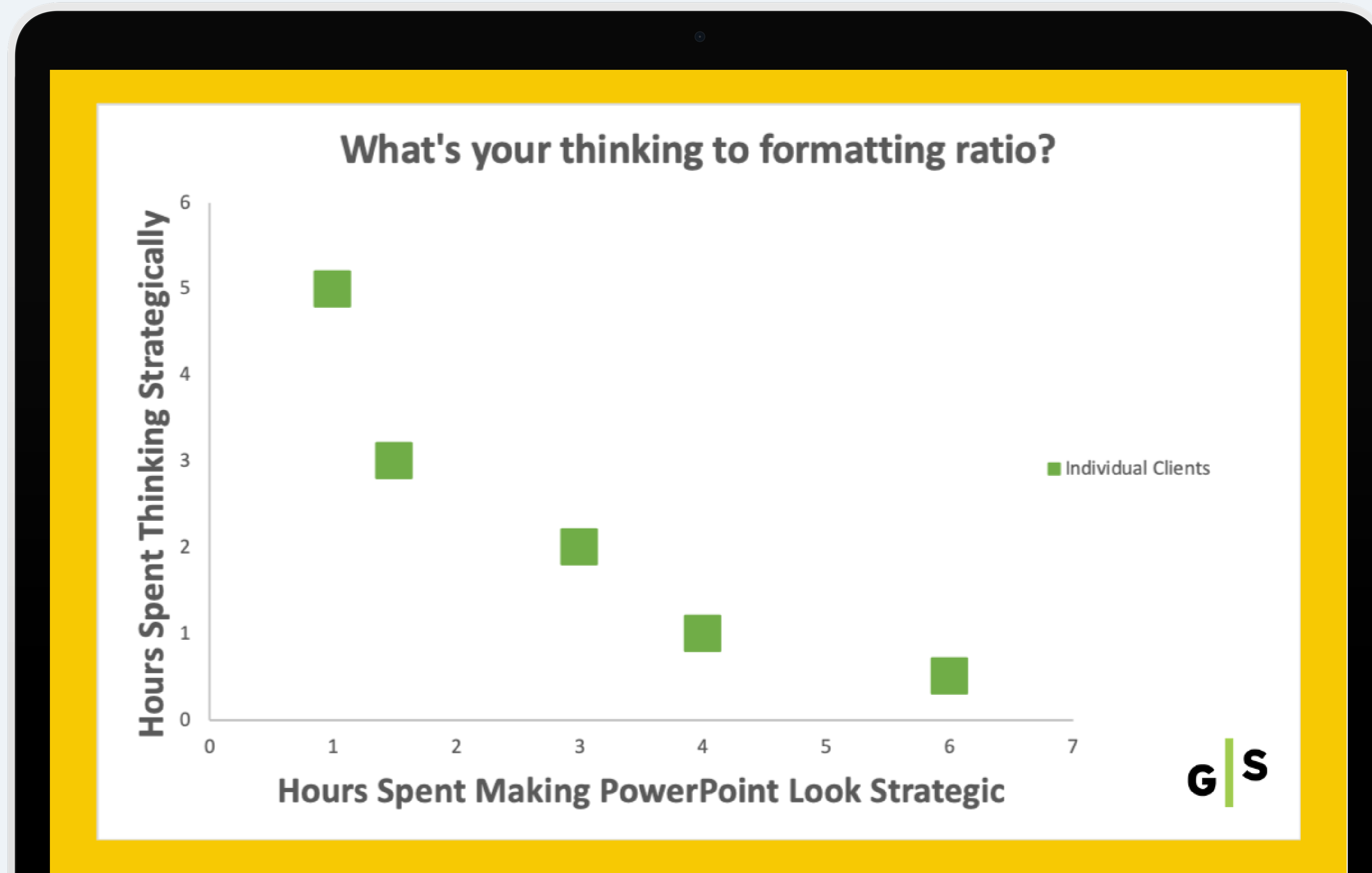


*7% words - 38% tone of voice - 55% body actions*

*Often quoted study by UCLA Professor Albert Mehrabian*

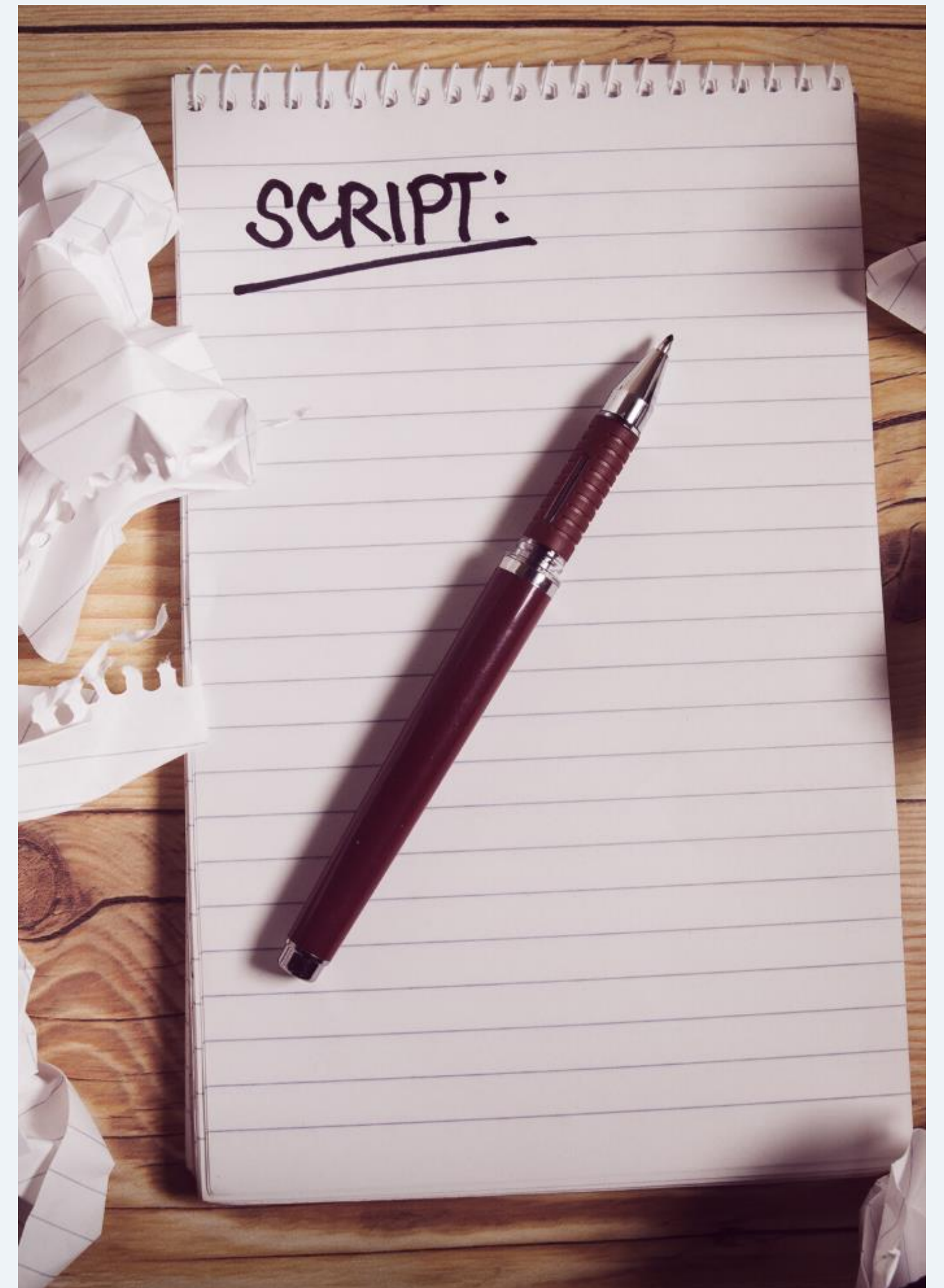


# Your Most Important Number #TTFR





- The Scene
- The Script
- The Cast
- The Rehearsal
- The Performance
- The Intermission
- The Review





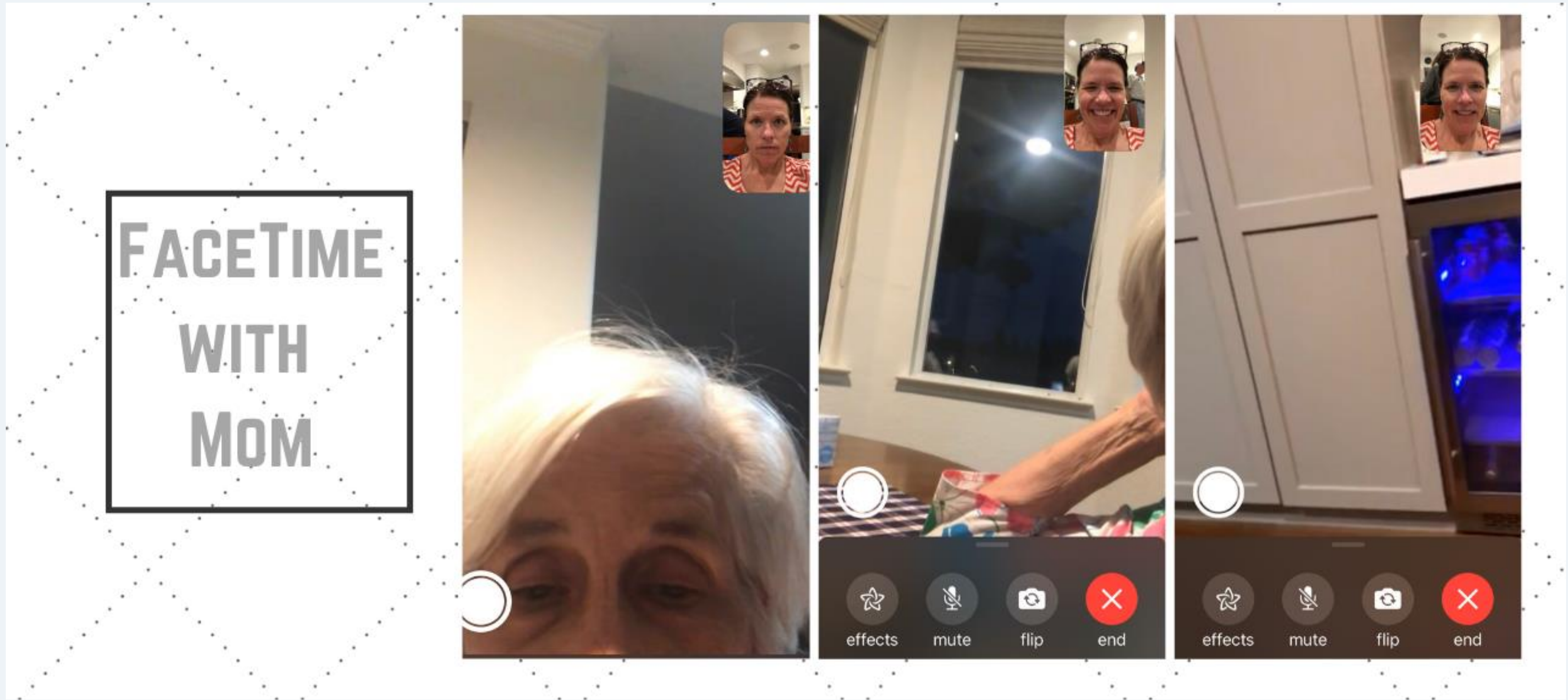


*Don't practice the old routine*

## Rehearse a new script

- 
- Assess background & audio quality
  - Rename yourself & nail the intro
  - Lose most of your props
  - Maintain focus on your 3 things
  - Choose a producer (*not that kind*)





*After almost 12 weeks of sheltering-in-place.*

*Make sure your teams don't plateau.*



What's your one thing?





**GENUINE** | **SHIFT**

**THANK YOU**

Jenn Walsh

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