

# Training the Technicians to Sell

By THOMAS C. WAYS

**D**uring the past four years, I have been training technical personnel in the sales skills needed to affect organizational production results. Teaching those skills was not difficult; getting technical people to use them, however, proved challenging.

An important issue faces the training department: Can technical support employees also help sell the company's products and services? The sales representative can no longer be expected to be the only person to affect production. On the average, sales representatives make 15 calls to customers every week. Considering that not all of these calls are productive, one can see the limited reach of the sales representative. Also, since many sales representatives have a widespread geographic territory, one can see the difficulty in operating on a face-to-face basis. The opportunity for increased production through proper training of technical employees can no longer be overlooked. The problem is how to turn technical employees into salespeople without turning them off.

In the property/casualty insurance world, one of the traditional methods of marketing products is through independent agents and brokers who may represent one or more companies. The insurance company uses a sales representative (or special agent/marketing representative) to sell its products and services to independent agents.

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This method is no longer sufficient to meet the challenges of the 1980s. Too often, a sales representative does not have sufficient time, product knowledge or resources to handle the increased complexity of selling to independent agents. Without using the technical support inherent in most branch operations, the full potential of increased production and market share will not be realized.

Traditionally, property/casualty insurance companies who market through The American Agency System rely primarily on the sales representative to act as the

dependent agent to the consumer.

The technical support person's function has primarily been in specialized technical knowledge. For example, personal lines and commercial lines underwriters are responsible for proper selection of risks so that the insurance company has a reasonable chance of making a profit. Traditionally, their role was one of profit rather than production. The loss control technicians functioned as the eyes and ears of the underwriter in helping them make sound judgments during the risk selec-

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selling arm (and liaison) of the company. Technical employees have not been used to their full potential to help the sales representative increase production and market share. It is important, especially now during extreme price competition, to involve technical support in marketing and selling of the company's products.

In most branch office operations, technical support consists of both personal and commercial lines underwriting personnel, loss control technicians, premium audit personnel and claims personnel. All of the above categories can be effectively trained to become a vital link in marketing and selling products from the company to the in-

tion process. The third technical role is that of the premium auditor, whose main responsibility is to ensure that the company receives the correct amount of premium for the exposure insured. Auditing the insured's records and notifying the underwriter of additional or return premiums accomplishes this. The final classification of technical employees is the claims representative. The claims representative's primary function is to investigate claims and make fair settlements with claimants.

Each of the above at one time or another affects the production of the branch or service office and insurance company. The personal or commercial lines underwriter can influence it through a

positive selling attitude when dealing with the independent agent. The loss control technician can affect it through positive use of selling techniques when dealing with agents and insureds. The premium auditor has the opportunity when dealing with the insured to help sell not only the company but the independent agents' services as well. And finally, the claims representative (who is the only company employee who deals with consumers of the product) has the opportunity to sell fair claim service and, ultimately, the consumer's image of the company.

Conversely, the sales representatives' primary role is to sell the uniqueness of their company's products and services to various independent agents within a territory. They must use all of their selling skills in face-to-face situations with independent agents

(and in some instances with consumers). Sales representatives also act as liaisons between company technical employees and independent agents. This can include resolving personality conflicts, collecting funds, negotiating contractual obligations, etc. Finally, and most important, the sales representatives must positively affect bottom line production for the territory in which they operate.

The technician can be effectively trained to become an additional sales arm of the company. The first and foremost thing to consider is that not all technical employees will use sales skills, even if they have been instructed in them. Also, a certain amount of resistance exists among technical employees to changing the traditional view of their job. These things, however, can usually be overcome by properly

presenting the training programs.

In providing sales and marketing training for technical employees, it is best to start off with the premise that you are not attempting to turn them into "salespeople." The best way to approach this type of employee is to provide the skill training on the basis of:

- Explaining exactly what the salesperson's or sales representative's job consists of;
- Discussing how you will help them become better communicators by providing them with sales skills.

We provided all technical people with a brief introduction to selling skills in the form of a six-hour, self-study instrument outlining the basics of selling. Included was a definition of selling and the need satisfaction selling approach, effective communications, feature/benefit selling,

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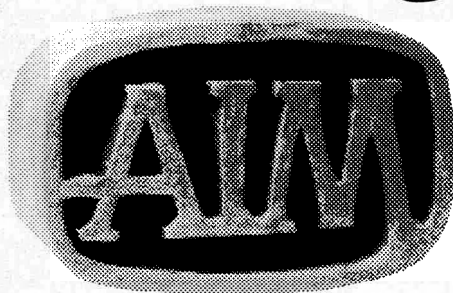
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handling objections and closing the sale. This was administered usually during their basic training period, along with technical skills training for their particular jobs.

The next step was to provide a 2½-day intensified face-to-face selling skills workshop structured on the premise that in order to be successful, one must be familiar with the various techniques of communicating effectively. The seminar, which was held in field locations, accommodated 20 to 25 technical employees from nearby offices. The first day was devoted to an overview of the sales process, communication techniques, using feature/benefits, handling objections and selling a "no decision." Attendees also received a night assignment to begin structuring a case study on a "real world" problem facing them on the job. On day two, the seminar con-

tinued with closing techniques and time management. The afternoon was devoted to a guest speaker, a local independent agent, discussing the technician's role and how he or she could affect the company's production by influencing the agents with whom they deal. Again, students received an evening assignment to complete their case study and to switch cases with other students to prepare for role playing the next day.

The final day of the seminar was reserved exclusively for role play. Each student played the "sales" role and received constructive criticism by his or her peers. This provided an opportunity to practice the techniques discussed during the seminar.

Any program that provides a self-study program or a workshop without practice or follow-up will not get the job done. Therefore, a system was

devised whereby the technical people were allowed to practice their skills by making joint agency calls with a sales representative. Also, the sales manager administered programs to reinforce the selling skills seminar.

The impact on companies' bottom line production (taking into account the economy and the severe price competition) has been most positive. The working relationship between the technical areas and the sales function has improved dramatically. With each function having a better understanding of the other's responsibilities and opportunities, a sense of teamwork and camaraderie has been established. This sense of teamwork has helped maintain a positive emphasis on both profit and production. Best of all, perhaps, management considered the training program an unqualified success. —TDJ