LESSON 5

The Open Door

Win the account without one bad word about the current agent.

1 · The account

One account you want, held by somebody else. Roles only, no names. When does it renew?

Example (fictional): a landscaping company, about 40 people, on a large-deductible plan. Renews 1/1.

2 · The picture of great

Two things a great agent does for an account like this. Only things you actually deliver. Then the Standard Question.

A great agent...	Can I deliver it today? (yes / no)
1.	
2.	

3 · The four moves

Write your line for each. Their words go in the right-hand column, word for word.

Move	My line	What they said
Standard Question: "How's that going today?"		
Step Back: "That may not matter much for you."		
A plan in their words: "What would you like me to do?"		
Exit Walk-Through: "If they match this, do we have the business?"		

4 · If the gap isn't real

Say so, and recommend they stay put. Then put them on your nurture list with a date.

5 · Long follow-up plan

Customize it to your business, territory and clients. Every contact ends with a dated next step and an owner.

Renewal date	Nurture (what, how often)	~120 days out: update the submission	~90 days out: submit	Cycle #

6 · Five-day log and Friday review

Three accounts this week. Keep your Morning Dig, opener and tally. Friday: show your manager what each client said, in their words.

Account (role only)	Gap they named (their words)	Invited in? Exit walked?	Next step (date)
1			
2			
3			

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