

Representative Lifecycle

Greet		Probe		Solve		Close	
Product Info/ Opportunity	1. Greet and identify self 2. Acknowledge need 3. Offer to assist 4. Verify account info 5. Confirm account status	1. Open-ended questions 2. Closed-ended questions 3. Select wrap code 4. Clarify and confirm issue		1. Recommend Action 2. Provide Alternatives		1. Summarize issue 2. Present next steps 3. Confirm action items 4. Clarify/confirm result/alternative 5. Document	
Agreement							
Training/ Marketing							
Compliance							
Positions/ Compensation							
Renew/Resign							