

Internal Sales Competition (ISC)

Prospect Profile

Fergon Insurance



Edward H. Schmidt
School of
Professional Sales

The Case

It was Friday night, and you were waiting patiently at Cameo Pizza for your order that you had placed earlier. As you sat there waiting, you noticed that the person next to you was wearing a University of Toledo t-shirt. Excited to meet someone else who loves UToledo, you strike up a conversation and discover that they are also an alum.

The individual's name was Pat Biker and happened to be the Managing General Agent at the Toledo office for Fergon Insurance (FI). You stated that you are a sales representative with Toledo Distribution Company (TDC) <or WorldWide (WW)>. Pat's business thrives on referrals, and he/she knows that the friend of a friend can play a vital role in building insights and networks that can help all parties. You decided to ask Pat for a meeting so you could learn more about Fergon Insurance, and he/she accepted and mentioned that it had been quite some time since any copier or document management salesperson had been out to the office.

Fergon Insurance Background

Preparing for your appointment, you did some research and found this information on FI's website:

At Fergon Insurance there are three key advantages that they strive daily to uphold and provide for their customers and employees:

- Integrity - Every decision considered at Fergon must benefit the following: the customer, the agent, and the company. Each is equal in importance, and if any one of them is missing, we simply won't do it.
- Stability – Toledo's FI is one of the company's largest offices the United States and represents more than \$90 million in annual insurance product sales. There are 10 offices nationwide. Our company's growth has been sustained through high customer satisfaction, innovative lead programs, and word-of-mouth referrals. High ratings from industry analysts indicate that our company will be here for many years to come to pay customer claims and operational and sales expenses.
- Relevance – no matter your stage in life or business or budget, Fergon will bring their consumer and commercial customers tailored policy options to choose from. Fergon is a one stop shop for life, health, home, auto, property and casualty, and more and shares their expert knowledge to help customers better understand their own needs so they can make confident and educated decisions.