



BUILDING RAPPORT

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- SMILE! - IT HELPS YOUR TONE SOUND WARM AND FRIENDLY
- ASK QUESTIONS - CREATE ENGAGEMENT WITH OPEN ENDED QUESTIONS
- LET THE CLIENT TALK - DON'T OVER TALK OR CUT THEM OFF
- LISTEN WITH INTENT - ACTIVE LISTENING SO YOU CAN TAILOR THE CONVERSATION TO THE CLIENT'S NEEDS
- F.O.R.M.- FAMILY, OCCUPATION, RECREATION, MONEY

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FAMILY

- ARE THERE CHILDREN IN THE HOUSEHOLD?
- HOW MANY ADULTS IN THE HOUSEHOLD?
- WHO OWNS THE VEHICLES?
- WHOSE NAME IS ON THE DEED?
- LIFE INSURANCE
- REFERRALS

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OCCUPATION

- KNOW YOUR CLIENT SO YOU CAN ADVISE YOUR CLIENT
- HOW DO YOU USE YOUR VEHICLES?
- ARE YOU USING YOUR HOME FOR BUSINESS?
- "TELL ME ABOUT YOURSELF, WHAT DO YOU DO FOR A LIVING?"

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RECREATION

- HOW MANY INSURANCE POLICIES DO YOU CURRENTLY PAY FOR?
- WHAT DO YOU LIKE TO DO ON THE WEEKEND?
- DO YOU OWN ANY RECREATIONAL VEHICLES?
- WHAT DO YOU TOW BEHIND YOUR TRUCK?
- LOOK FOR TRIGGER WORDS

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- COVERAGES
- UMBRELLA
- LIFE INSURANCE
- LONG TERM CARE
- ANNUITIES
- RETIREMENT
- STOP BEING AFRAID TO TALK TO YOUR CLIENTS ABOUT MONEY

MONEY