



REMOTE LABS

SALES PROCESS



SALES PROCESS

FRONT OF THE CALL

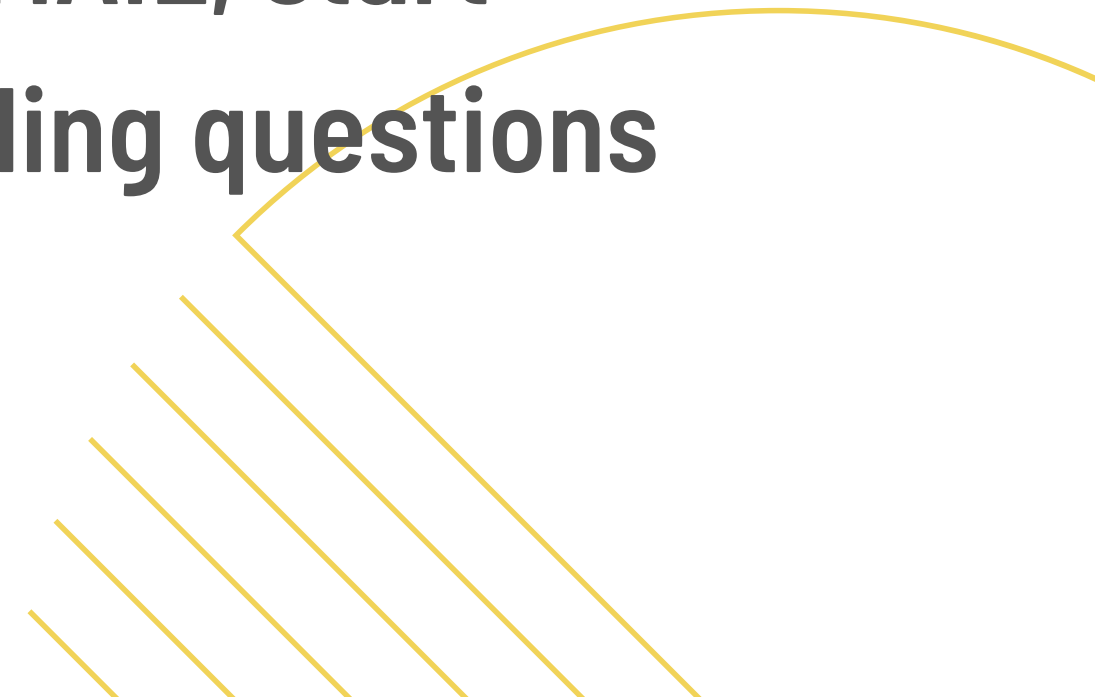
- Gratitude, Graciousness, Positive Affirmation
- Personal Value Statement
- Assume the TEXT
 - "Hey is this your cell we are speaking on?"
- Why are they shopping?



SALES PROCESS

RAPPORT

- Family, Occupation, Recreation, Money?
(while data entry)
- How Many Lines of Insurance?
- Quote on the spot, this is
IMPORTANT (this will just take a few
minutes), **DO NOT EMAIL**, start
asking rapport building questions



SALES PROCESS

EDUCATION & VALUE

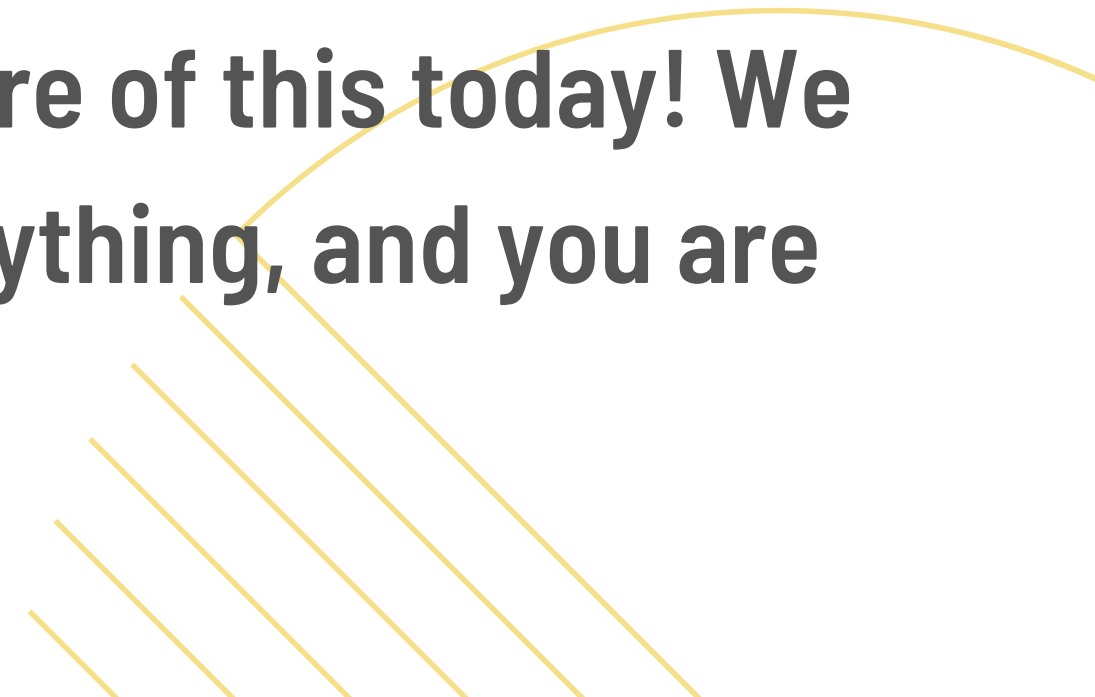
- Coverage Education, PUP Education
- Life Insurance Conversation is NORMAL
- How do they currently pay?
- Recap Coverages and Discounts
- Bundle Policies & Price



SALES PROCESS

CLOSING

- Do you understand everything we went over today?
- Do you feel this is the right coverage for you?
- What's the account & routing number so we can get everything started today?
- Overcome Objections Twice, "This is important, let's take care of this today! We already went over everything, and you are underinsured."



SALES PROCESS

AFTER THE BIND

- Assume the Follow Up, thank them for their time today
- Let them know what happens NEXT:
Service & Customer Care
- Ask for a referral!
- Set the Life Appointment

