

Steps

01

SUMMARIZE

Review the conversation: vehicles, coverages, deductibles, et Cetra.

02

CHECK ALL ISSUES COVERED

Have we met their needs: covered their concerns, closed any gaps in coverage? Have we built the policy they want? If we have, then proceed forward. If not, go back to the issue and find a way to resolve it.

03

CHECK COMPROMISES

"I know you wanted a lower deductible, but when things are better financially for you we can always make changes in the future! You will have my number to speak with me directly and we can get that taken care of."

04

ASSUME THE CLOSE

Let's get this policy started today!

05

FORMAL OFFER

Confirm desired coverages and the premium



Steps

06

CONFIRM AND RECORD

Review the start date for policy and bind, and gather the payment information.

07

WHAT'S NEXT

Discuss getting ID cards, any documents to sign, and canceling with the current insurance company.

08

PLEASANTRIES

Pleasantries

Welcome them, introduce the office staff, and ask for referrals.

Talk Path

"It was great working with you today! I'm so glad we have created a policy that better meets your needs. Do you know anyone who could also use my help understanding their policies and saving money? I can take their number to set an appointment and let them know I will be calling.

For every person who also starts a policy with me, we will give you a gift card to say thanks!"