

# REMOTE LABS SALES CHECKLIST

- ☐ Gratitude, Graciousness, Positive Affirmation
- ☐ Personal Value Statement
- ☐ Assume the TEXT
- ☐ Lead Manager Lead Assignment
- ☐ Why are they shopping?

1

- ☐ 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 instead set the follow up appointment. (Do you prefer mornings or afternoons?)

2

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

3

- ☐ Do you understand everything we went over today?
- ☐ Do you feel this is the right coverage for you?
- ☐ What's the account 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"

4

- ☐ Assume the Follow Up, Thank them for their time today.
- ☐ Let them know what happens NEXT: Service & Customer Care
- ☐ Ask for a referral!

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