

Role + Purpose Outline

Objective: Eliminate the objections you most commonly hear, build trust, outline a process, set the tone for the appointment, give you confidence through consistency

The Agent's Role

(Avoids the "I need to shop around" objection. Fosters the herd mentality. Builds loyalty.)

- I work for you, not the insurance companies
- I can shop around for you
- I help 10-15 families per week in your area

The Prep

(Eases awkwardness of personal questions and sets control/posture)

- We will talk about personal things such as health, family and finances.
- This helps me determine your needs and create solutions.

The Takeaway

(Builds trust, anti-sales mentality and enforces your character)

- Most people need less coverage than they think they do
- If there is no need = I will let you know. Luxury or necessity?

The Client's Role

(Helps them feel in control, avoids "need to check my budget")

- You pick out your program
- You choose your budget

The Process

(Enforces that biz is taking place tonight. Eases mind about next steps. Builds loyalty and trust. Avoids "think about it." Solidifies client for life.)

- We submit application today
- Arrange policy delivery and QMS
- Annual review