

FOLLOW SHEET

NAME: _____

CLIENT: _____

1. Icebreaker

-SMILE before saying anything
-Observe surroundings to make connections (ex. hunting, fishing, family, sports, etc.)

2. 3D Names / Businesses Cards

-Take note of biz name owner, GM name, etc.

Example: "I caught up with Joe at the body shop and they have an adorable dog!"

*Use Business Card Sheet

3. Build Rapport & Make Connection

Example: Kids go to the same school or same age, hunt hobbies, or maybe their kid is in the same class as another protected family.

4. Start Movement

-Towards office, seat, table, or area

5. Diving Into: Why do you say ____ ?

-Why do you say cancer, heart, or accident?
-How long, where? Local or travel?
-Who else do you know?

6. The bad news & reason why we work with so many families

-Show family protect list
-Express how it can be emotionally, physically and financially challenging.

7. Not telling indirect cost

Example: "If you couldn't work for 6 months to a year, how would that affect you?.. What do you say to that? .. Exactly. Because if you're not working, you're not...? If you're not making money, you're not paying...?"

8. Use Names 10-15 times in presentation

-People love hearing their name- it's their favorite word!

Example: "that's what Jake and Katie and so many other families/young/married/retired folks say/do, etc.."

9. Become a story-teller

Example: "If you got hurt, we would pay you.... When I was talking with Mike, his daughter broke both of her arms and we would've paid over \$16,000..."

10. Soft Close / Closing Questions

Example: "Can you see why so many people pick this up? This really could've helped you when you... Can you see why a lot of people say it's a no brainer?"

11. Tailor Claims / Indirect Direct Cost

-Married, retired, single young folks

12. Aflac

-How to tweak presentation for policy review

13. Referrals / Pre-approach

14. Special & Tailored Closes

