



ELEVATE: TOOLKIT REVIEW

TOOLKIT REVIEW

1. What does the acronym FORM stand for?
2. What is the first question you should ask when speaking with a customer?
3. What is the percentage attributed to "how you sound" in the sales matrix?
4. What is the percentage attributed to "what you say" in the sales matrix?
5. When we speak to a prospect, due to industry marketing what are their 2 main buying triggers?
6. When calling a client, how long do we have for them to decide to do business with us?
7. When calling a client, how do we identify our company?
8. What are the 3 objections we get when calling a lead?
9. Explain how our phone system works on returned calls to our DID (Dedicated In-Dial) lines.
10. If a customer declines to give you information during the customer conversation, what should you do?



ELEVATE: TOOLKIT REVIEW

TOOLKIT REVIEW

11. What are the 2 pieces of information we must collect at the beginning of Step 2 of the customer conversation?
12. What is the first opportunity to uncover a second line of business?
13. How do we initially determine the third line of business we will offer a client?
14. What is the concept we present to explain the things that are not covered by Homeowner's insurance?
15. If someone rents, what fire policies do we typically present?
16. If someone owns a home, what fire policies do we typically present?
17. What is the first opportunity in UAX to identify a need for Short Term Disability?
18. At the end of Step 2, how do you know you are moving on to Step 3?
19. What are the 6 price points available at the end of Step 2 of the sales process?
20. What is the title of Step 3 of our Customer Conversation?



ELEVATE: TOOLKIT REVIEW

TOOLKIT REVIEW

21. Under what section of Step 3 should you find out the customer's health, life, and supplemental benefits?
22. What is the title of Step 4 of our Customer Conversation?
23. How do we present financial service premiums if we are slightly or a lot higher?
24. What documents do you have to get signed before the customer gets temporary ID cards when purchasing auto insurance?
25. What is the key rule to cancelling the customer's prior insurance?
26. What is the format to the account note when you write a new customer?
27. How do we start the conversation with any difficult customer interaction?
28. What are the 4 R's?
29. When do we move on from a 4R conversation?



ELEVATE: TOOLKIT REVIEW

TOOLKIT REVIEW

30. What is the golden rule of life insurance?
31. What are the 5 premium bands of life insurance?
32. What is the minimum death benefit we illustrate when explaining permanent life insurance to a customer?
33. When explaining any whole life products, what box do you have to check in the report set-up section of Philibert to create the illustration we show a customer?
34. What are the 5 things (in order) that whole life insurance does for a customer?
35. What is the Rule of 72?
36. By contributing to a Universal life policy, what 3 elements of the market are eliminated versus contributing to a deposit product?
37. What are the 4 parts of our marketing plan?
38. What are the 5 pillars of our business?