



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 percentage of the Sales Matrix is attributed to "how you sound"?
4. What percentage of the Sales Matrix is attributed to "what you say"?
5. Due to industry marketing, what are a prospect's two main buying triggers?
6. When calling a prospect, how long do we have for them to decide to do business with us?
7. What are the three objections we get when calling a lead?
8. If a customer declines to give you information during a conversation, what should you do?
9. What are the two pieces of information we must collect at the beginning of Step Two of the Customer Experience?
10. What is the first opportunity to uncover a second line of business?



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11. How do we initially determine the third line of business we will offer a customer?
12. What is the concept we present to explain the things that are not covered by Homeowner's insurance?
13. If someone rents, what fire policies do we typically present?
14. If someone owns a home, what fire policies do we typically present?
15. What is the first opportunity in the auto quoting process to identify a need for short-term disability?
16. At the end of Step Two, how do you know you are moving on to Step Three?
17. What are the Six Price Points available at the end of Step Two of the Five Step Customer Experience?
18. What is the title of Step Three of our Customer Experience?
19. Under what section of Step Three should you find out the customer's health, life, and supplemental benefits?
20. What is the title of Step Four of our Customer Experience?



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21. How do we present premiums for financial services if we are Slightly or A Lot higher?
22. What documents must be signed before the customer gets temporary ID cards for their auto insurance?
23. What is the key rule to cancelling the customer's prior insurance?
24. What is the format of the account note when you onboard a new customer?
25. How do we start the conversation with any difficult customer interaction?
26. What are the 4R's?
27. When do we move on from a 4R conversation?
28. What is the Golden Rule of life insurance?
29. What are the five premium bands of life insurance?
30. What is the minimum death benefit we illustrate when explaining permanent life insurance to a customer?



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31. When explaining any whole life product, what box do you have to check in the report set-up section of the quoting tool to create the illustration we show a customer?
32. What are the Five Things (in order) that whole life insurance does for a customer?
33. What is the Rule of 72?
34. By contributing to a Universal life policy, what three elements of the market are eliminated versus contributing to a deposit product?
35. What are the Four Parts of our community-based marketing plan?
36. What are the Five Pillars of our business?