

ELEVATE TOOLKIT TEST: *AGENT EDITION*

- 1 What does the acronym FORM stand for?

- 2 What is the first question you should ask when speaking with a customer?

- 3 What three things does it take to get prospects to buy from us?

- 4 When initially speaking to a prospect, what are their two main buying triggers?

- 5 When marketing to a prospect, how long do we have to capture their attention?

- 6 What are the three objections most commonly received when calling a lead?

- 7 What mistake is most commonly made by inexperienced team members in relation to the Sales Matrix?

- 8 What are the two pieces of information we must collect at the beginning of Step Two of the Customer Experience?

- 9 What question in the Customer Experience generates the first opportunity to uncover a second line of business?

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Agent Edition

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- 10** If a customer has a car, rents their home, and has two young children, what is our likely third line of business?
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- 11** What is the concept we present to explain the things that are *not* covered by Homeowner's insurance?
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- 12** If a customer is single and rents, what three products might be logical to present?
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- 13** When working with a customer who owns their home, what additional policies (other than auto) are logical to present?
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- 14** What is the first opportunity in the auto quote to identify a need for Short Term Disability?
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- 15** What is the transition question from Step Two to Step Three in the Customer Experience?
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- 16** What are the six pricing outcomes available at the end of Step Two of the Customer Experience (in order from worst to best)?
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- 17** From what price point or better should we close 100% of the time utilizing our systems and premium trade-offs?

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- 18 Under what piece of Step Three should you ask questions regarding the customer's health, life, and supplemental benefits?

- 19 How do we present financial services premiums if we are slightly or a lot higher?

- 20 What is the key rule in cancelling the customer's prior insurance?

- 21 What information should be included in the New Account Note related to auto insurance?

- 22 When handling a 4 R issue, what is the first thing we deliver?

- 23 What are the 4 R's?

- 24 What is the golden rule of life insurance?

- 25 What are the five premium bands of life insurance?

- 26 What is the minimum death benefit we illustrate when explaining permanent life insurance to a customer?

- 27 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?

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- 28** What are the five things (in order) that whole life insurance does for a customer?
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- 29** What are the four things Return of Premium Life does?
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- 30** What is the Rule of 72?
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- 31** By contributing to a Universal life policy, what three elements of the market are eliminated versus contributing to a deposit product?
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- 32** What are the four parts of our marketing plan?
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- 33** What percentage of the time should our team follow our systems?
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