

ELEVATE TOOLKIT TEST:

TEAM MEMBER EDITION

- 1 What does the acronym FORM stand for?

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

- 3 “How you sound” accounts for what percentage of the sales matrix?

- 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 During the Five Step Customer Experience, if a customer declines to give you the answer to a question, what action should you take?

- 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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- 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 someone rents, what fire policies do we typically present?
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- 13** If someone owns a home, what fire policies do we typically 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 price points available at the end of Step Two of the sales process?
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- 17** What is the title of Step Three of our Customer Experience?
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- 18** Under what piece of Step Three should you ask questions regarding the customer's health, life, and supplemental benefits?
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- 19 How do we present financial services premiums if we are slightly or a lot higher?

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

- 21 What is the format to the account note when you write a new customer?

- 22 How do we start the conversation with any difficult customer interaction?

- 23 What are the 4 R's?

- 24 When do we move on from a 4R conversation?

- 25 What is the golden rule of life insurance?

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

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

- 28 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?

ELEVATE

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29 What are the five things (in order) that whole life insurance does for a customer?

30 What is the Rule of 72?

31 By contributing to a Universal life policy, what three elements of the market are eliminated versus contributing to a deposit product?

32 What are the four parts of our marketing plan?



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