

WELCOME TO EVOLVE I



**TROPHY CLUB
CONSULTING LLC**

"DISCIPLINE TAKES NO VACATION"

DISCLAIMER



TROPHY CLUB CONSULTING IS A
PRIVATELY-OWNED COMPANY THAT IS
NOT AFFILIATED OR ENDORSED IN ANY
WAY BY STATE FARM.



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Emotional Connection

- Do you move me?
- People must feel they have a connection with you.

Credibility

- Why should I believe you?
- Consumers must relate to you, your message, and your product or service..

Logic

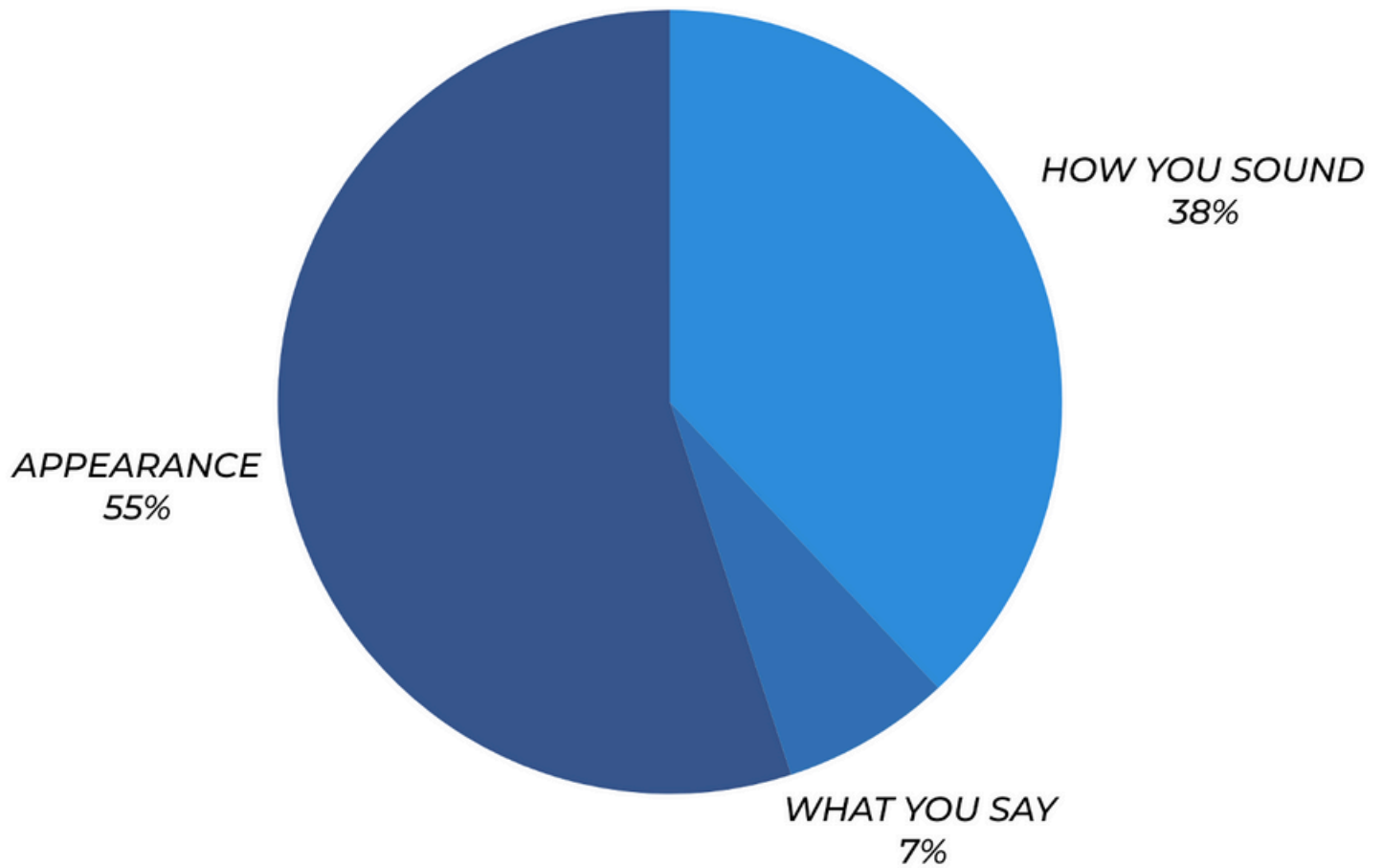
- Does what you are saying make sense ?
- The products and services you present must be relevant to the consumer's current situation.



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The Sales Matrix





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FORM

**FORM is the most important aspect of the customer conversation.
Customer needs are at the forefront of all product recommendations.
Without FORM you cannot properly make professional recommendations.**

Family

Occupation

Recreation

Money

QUOTE AND ONBOARDING CHECKLIST

TM Name _____

Step 2 – Fact Finder

Customer Name _____ DOB _____ Age _____

F _____

O _____

R _____

M _____

Marketing Source _____

Contact Preferences for Text and Email Enabled

Current Company _____ Price _____

Review Consumer Report Disclosure

Car loan amount _____ Payment _____

Rent Payment _____

Mortgage Payment _____ Balance _____ Term _____

Appointment – In Person _____ GNC _____

Step 3 – Coverage explanation

Liability Amounts to Protect

Home Value _____

401K _____ Savings/Brokerage _____

Medical Payments: Health _____ Life _____ DI _____ Supp. Health _____

Introduce team leader _____

Step 4 – Presentation

Lines Presented _____

Follow Up If Not Closed

Task Created with Timestamped FORM _____

Calendar Invite – Date _____ Time _____

Step 5 - Close

Explain claim process

Explain DSS – Text SAVE to 42407 -- Mobile App Enrollment – Text MOBILE to 78836

E-sign Recurring Monthly Agreement

Call prior company to cancel with customer

Outlook New Meeting for term conversion or disability in one year with three day reminder

Referrals _____

Review (Google/Facebook/etc.)

Send Welcome Email with review post instructions and "cc" Agent

Note - New HH xx/xx/xxxx

➤ FORM

➤ A F L H I: current company price and coverage, changes made and why, recommendations declined

Quote information or sales information entered into sales tracker.



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QUOTE AND ONBOARDING CHECKLIST

Step 1 – Lead Transition

- Take quotes immediately
- Sell an appointment or Good Neighbor Connect
- Stay in the affirmative

Step 2 – Fact Finder

- No objections, no advice
- Ask all questions in application, enter accurate data
- DSS on all quotes

Step 3 – Coverage Explanation

- Use clear, simple examples
- Continue fact finding with liability and medical payments
- Explain all coverage

Step 4 – Presentation

- Emotion, Credibility, and Logic
- Present the correct three or four lines of business based on need
- Do not present without knowing their total price
- Premiums Monthly, Savings Annually
- Overcome objections by presenting down to daily and looking for logical trade-offs
- Low/High with deductibles
- Pay yourself first
- Do the math for them, do not use % for discounts
- Explain what products do, not what they are called – no insurance jargon
- Present advantages of working with us – What's in it for them
- Local, claims handling, policy features and benefits, systematic processes, free financial guidance

Step 5 – Close

- Simplicity and convenience
- Cancel with them, do not let them do it on their own
- Do not give proof of insurance without all signed documents
- Extend the opportunity with referrals and reviews
- Schedule New Meeting in Outlook at point of sale for review



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THE FIVE STEP CUSTOMER EXPERIENCE

LEAD TRANSITION > FACT FINDING > COVERAGE EXPLANATION > PRESENTATION > CLOSING

LEAD TRANSITION

Good morning/afternoon may I speak to _____, please?

_____, this is Dan calling from (Agent Name) Insurance here in (Location). How are you doing today? I received information you were shopping for insurance and just need a few minutes to save you money. Did I catch you at work today?



Prospects decide to stay engaged within eight seconds of the first contact.



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THE FIVE STEP CUSTOMER EXPERIENCE

LEAD TRANSITION > FACT FINDING > COVERAGE EXPLANATION > PRESENTATION > CLOSING

COMMON OBJECTIONS

NO TIME

NOT INTERESTED

JUST SWITCHED



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FACT FINDING

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10