

ELEVATE WORKSHEET



Utilizing the Quote and Onboarding Checklist

STEP ONE - LEAD TRANSITION

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

STEP TWO - FACT FINDER

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

STEP THREE - COVERAGE EXPLANATION

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

STEP FOUR - 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 FIVE - 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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STEP TWO - 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 Balance _____ Payment _____ Rent Payment _____

Mortgage Payment _____ Balance _____ Term _____

Appointment - In Person _____ GNC _____

STEP THREE - COVERAGE EXPLANATION

Liability Amounts to Protect

Home Value _____ 401K/Retirement _____ Savings/Brokerage _____

Medical Payments: Health, Life, DI, Supplemental Health _____

Introduce Team Leader

STEP FOUR - PRESENTATION

Lines Presented _____

FOLLOW UP IF NOT CLOSED

Task Created with Time-Stamped FORM

Calendar Invite - Date: _____ Time: _____

STEP FIVE - 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 ONE YEAR MEETING

Referrals _____

NEW HOUSEHOLD NOTE ENTERED

FORM INFORMATION:

PRIOR CARRIER BY LINE OF BUSINESS: COVERAGES, PREMIUMS, CHANGES MADE
AND WHY, RECOMMENDATIONS MADE THAT WERE DECLINED

REVIEW (SOCIAL MEDIA PLATFORMS & GOOGLE)

QUOTE INFORMATION OR SALES INFORMATION ENTERED INTO SALES TRACKER



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Upcoming Classes

(All classes Eastern Standard time)

- ❖ February 11 - Quick Hit (10:30AM-10:45AM)
(Cleaning Up Existing Households)
- ❖ February 12 - Elevate (1:00PM-1:30PM)
(Customer Service To Life)
- ❖ February 16-17 - Evolve II Sales (12:00PM-2:00PM)
- ❖ February 18 - Quick Hit (10:30AM-10:45AM)
(Interview with a Top Producer)
- ❖ February 19 - Elevate (1:00PM-1:30PM)
(100 Application Development Plan)
- ❖ February 25 - Quick Hit (10:30AM-10:45AM)
(GIFE Fundamentals)

Trophy Club Links



FOLLOW US
ON FACEBOOK



FOLLOW US
ON LINKEDIN



FOLLOW US
ON INSTAGRAM



LEAVE US A
GOOGLE REVIEW

