

# Elevate WORKSHEET



## Quote and Onboarding Checklist

TM Name: \_\_\_\_\_

### 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 Coverage \_\_\_\_\_ 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 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: 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 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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## Upcoming Events

### Foundations

November 9th - November 11th Register online at [www.trophyclubconsulting.com](http://www.trophyclubconsulting.com)

### Evolve

November 30th - December 2nd Register online at [www.trophyclubconsulting.com](http://www.trophyclubconsulting.com)

### Agent Summit - Get Your Custom Business Plan!

April 26<sup>th</sup> - April 28<sup>th</sup>, Charlottesville, VA

### Team Precision - with Sara Labraaten

Register online at [www.trophyclubconsulting.com](http://www.trophyclubconsulting.com)

## Trophy Club Links



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