

Date		Hours	
Trainer		Calls	
Trainee		Demos	
Agency		Apps	

	Yes (√)	No (√)	Evaluation	Notes
Pre-Approach				
1.			Is PRE-APPROACH pad organized (i.e., symbols, abbreviations, tracking)?	
2.			Does it have "essential" and "helpful" information, i.e., names, times, work, vehicle?	
3.			Is the information being gathered in layers?	
4.			Is there "salt-n-peppered" gratitude being given for helpful information?	
5.			Are REFERRALS being gathered from EVERYONE?	
6.			Are memory joggers being used to promote more names (i.e., family, friends, neighbors, church members, co-workers, hairstylist, mechanic, etc.)?	
7.			Is the information being gathered in layers?	
8.			Is the correct information being asked for or recorded?	
Approach				
9.			Is positioning correct (i.e., distance from door, profile, etc.)?	
10.			Are the 1st, 2nd, and 3rd approaches being delivered word for word?	
11.			Using names and pointing out neighbors (showing names list/pre-approach pad)?	
12.			WIPING FEET when doing a residential approach and gesturing towards the PRODUCT MENU PAGE when doing a business approach?	
13.			Other non-verbals: Waving at something / smiling to show friendliness, tapping watch, etc.	
Introduction				
14.			BUILDING RAPPORT (approximately 4-8 minutes).	
15.	/	/	Showing genuine interest? Finding common ground?	
16.			Body language relaxed? Using names?	
17.			Sharing local/relatable cancer stories with discretion?	
18.			Asking who they know who has had cancer using memory joggers?	
19.			Asking pertinent questions relating to cancer story to help develop and fill need later?	
20.			Showing empathy and compassion during this portion?	
21.			Transitional phrase into presentation book ("...Nearly everyone I talk with tells me how...")?	
22.			BUILDING INTEREST/NEED	
23.			Spending ample time drawing out indirect costs from prospects on page 3?	
24.			Asking need generating questions: <ul style="list-style-type: none"> If you or spouse could not work for 6 mos. to a year, how would that affect your family financially? Why do you feel that way? 	
25.			Sitting back and setting pen down as you ask those questions?	
26.			BUYING ATMOSPHERE	
27.			Reading 5-10 names from Names List ("You probably know...")?	
28.			Getting verbal commitment to getting a YES or NO at the end from Prospect?	

Field Evaluation, completed by Trainer, page 2

	Yes (√)	No (√)	Evaluation	Notes
Presenting the Benefits				
29.			Using the "Three Levels of Presenting," (Features, Benefits, and Advantages)?	
30.			Using 3RD PARTY NAMES effectively?	
31.			Showing how the benefits fill prospect's personal need for the product?	
32.			Using the "Q?" (Example: The Jones liked the policy's "no lifetime limits" and the Smiths said they liked the money being "paid directly to you," of what you have seen so far do you like the best? Why is that important to you?)	
33.			Cover the Limitations and Exclusions?	
34.			Our Commitments?	
35.			Price Build-up?	
The Close				
36.			Transition to the Close?	
37.			Using Names / Names List?	
38.			Using Closing Script word for word?	
39.			Assumptive Close?	
40.			Close and Stay Closed (break eye contact; pen and eyes on address box)?	
41.			Filling out paperwork?	
Responses to Objections				
42.			Body Language?	
43.			Using the script word for word (F...F...F...)?	
44.			How many Responses were used?	
Solidification				
45.			Explains all of the next steps after completion of the sale?	
46.			Leaves behind all relevant materials?	
Referrals / Field Recruits				
47.			Asks for Referrals using the Referral Sheet and for Field Recruits using the Field Recruiting Sheet?	
Miscellaneous				
48.			Use testimonials?	
49.			Eye contact?	
50.			Painting "Mental Pictures"?	
51.			Setting appointments?	
52.			Voice tone?	
53.			Enthusiasm?	
54.			Using pen?	
55.			Pick right place?	
56.			Ask effective questions?	