

Follow Sheet

1. Icebreaker- smile before say anything (observe surroundings for something you can connect to them- ex. Hunting, fishing, pictures of animals)

2. 3D names/businesses cards (biz name owner/ gm name something on them - ex. I caught up with Joe at the body shop and they have that adorable dog. *Use business card sheet)

3. Build rapport and make a connection (kids go same school or same age, hunt hobbies, or maybe there kid same class as other protected family)

4. Start movement towards office, seat, table, or area

5. Diving into: Why do you say (cancer, accident, heart) how long, where local, or travel, who else do you know

Name: _____

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Client:

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Stories

Follow Sheet

6. The bad news and reason why work with so many families (show family protect list, it not only can it be emotionally physically challenged but financially.)
7. Not telling indirect cost letting them (if you couldn't work for 6 months up to a year how would that affect you. What do you say that? Exactly because if you're not working, you're not...? If you're not making money, you're not paying...?)

8. Use names 10-15 times in the presentation. Indirect page that's what Jake and Katie said and so many other families/young/married/retired
9. Become a story-teller/paint them in the story (for example if you got hurt and slept we would pay you..... when I was talking with Mike, his daughter broke his two arms and we would've paid over \$16,000)

10. Soft close/closing questions throughout (Can you see why so many people pick this up. This really could've helped you when you.... can you see why a lot of people say it's a no brainer)

11. Tailor claims/indirect direct cost/soft close Married folks, retired folks, single young folks

12. Aflac- how to tweak presentation for policy review

13. Referrals/pre-approach
14. Special and tailored closes