Presentation Steps

This is just a reference guide to follow. You need to make sure you view the video of my presentation in the Agent Portal on the website.

Make sure you watch the Presentation Tips Video. You need to ask certain questions and use them throughout the Presentation to help close deals.

- Warm Up
- Who You Are (Agent/Broker Explanation)
- 3 Reasons for sending in the card (Don't move forward without a why!)
- Ever been responsible for a funeral? Who will be responsible for your funeral? Are you thinking traditional burial or cremation?
- Whole Life vs Term Life comparison
- Recap the plan THEY built – (So, let me make sure I have this correct. You sent the card in because of X. You were responsible for X funeral. When you pass away, X will be responsible for yours. You are wanting to do a (Traditional Burial/Cremation) and between WL or Term, you agree that WL is the best option?
- 3 Discounts (The 3rd discount should verify if it is checking or a card and the day they get their money!)
- Get health conditions/medications
- I Am Your Policy while you Quote.
- Explain Company Selection (Use Brochure)
- Give Quotes to client and start Assumption Close (Asking Questions off the Application)

Call the Agent Hotline if you get stuck at any step of the process!