

## 15WEBTTS In-Home Presentation

- **15 – 15 Minute Warm-up**
  - Find kitchen table and begin small talk and discovery to learn about the clients
  - Focus on things of “meaning” such as family, hobbies, interests, etc.
  - Try not to bounce from topic to topic; use open ended questions to learn who they are
  - Remember to share things about yourself. Use 3/1 Rule – They give 3x more info about themselves than you.
  - Give good eye contact, body language, and actively listen to them. Don’t focus on what to ask next. Let the conversation move in a natural manner.
- **W – Why – Yours First, then theirs**
  - Transition into “Let me tell you why I’m here today....”
  - Share a deep why about you. Discuss personal stories to relate to your clients. Who do you know that passed away? What did it look like? Were they prepared? How did it make you feel? Share as many details as possible. Paint the picture for the client.
  - Ask, “Now that you know why I’m here, why is it important for us to take care of your family today?”
  - Actively listen to their response and don’t cut them off. Let them share their Deep WHY. This connection is strong and builds a bond. Shows that you are different from others and truly care.
- **E – Edify**
  - Edify (compliment) your clients on sharing their why with you. Make them feel good about being able to talk about difficult things and opening up to you so we can help them best.
- **B – Budget & Health**
  - Use the Needs analysis to gather info about their health, income, and other insurances. Be as detailed as possible.
  - Have them gather prescriptions and take copious notes on dosages, etc.
  - Find out the sources for all income and how much each spouse would lose in the event of premature death of the other spouse.
- **T – Ten Point Presentation**
  - New agents text a copy of the needs analysis to your manager and or Pete and call for help selecting a product before presenting info on products.
  - Use the 10 Point Presentation Sheet for the product type and carrier so the client understands what they are purchasing. This will set you apart as a true pro.
  - Summarize each bullet point of each and ask the client, “How do you feel this would solve your problem?”
- **T – Think about it**
  - Ask confidently, “Now that we know this will work for you, is there anything besides finding something that fits the budget that would prevent you from handling this today?”
  - Get the commitment upfront before showing any options. Quoting before this commitment will result in hearing “I have to think about it.”
  - If they aren’t agreeing to handle it, step back and figure out why. What did you miss? What’s their hold up? If you can’t figure it out, don’t leave before calling to counsel with your manager.
- **S – Show Options**
  - Start from the least expensive option and work your way up. Only show two options and ask, “Do one of these options work or would you like to see more?” Stay quiet and allow them to respond.
  - They will tell you if they are comfortable to move to a higher option. DO NOT show the highest option first. You may shock them and blow the whole sale. Work from the bottom up.
  - Take the application
- **S – Small Talk**
  - Warm down with the client. Don’t just leave after the app. Spend time continuing the relationship.
  - Use the Emergency Contact form to get referrals.