Share THIS Video

Leads

Referrals

10

You get a new lead

10

Qualifying Call
Make sure they are someone you can actually help.

What To Expect Video
Relaxing the client and preparing them for the questions you will ask.

7

Needs Analysis Meeting
Go through the client's needs.

7

Develop Statement of Advice
Research & put together options for the client.

Our Recommendations & Prop
Explain the importance of non disclosure, types of questions & what is needed.

7

Presentation Meeting & Prop
Present the options & complete the proposal.

6

Check & Submit The Proposal
Write up and submit prop to insurer.

Understanding Underwriting
Give your clients clarity on what may happen in the underwriting process.

6

Complete Underwriting
Medicals, further questions are completed.

3

Policy Issued
The client's policy is issued.

Feedback Survey
Sent at the end of each new policy to drive testimonials and referrals

3

Policy Docs Sent
Or delivered depending on your process.

Monthly Video Education
Keeps ongoing touches, educates your client, more referrals.

6 Monthly Review
Check-in
Simple video checking in if anything has changed.

Referral Competitions
Drive more referrals to your perfect clients.