

Setting a FACE TO FACE APPOINTMENT

- ✚ Know you can help them!
- ✚ Use your phone script and stick to it!
- ✚ Build rapport. (just be yourself and talk to them like a friend...not a telemarketer)
- ✚ Talk about how you are going to be looking at a number of companies (never give them one company...you don't want them to price shop you) because different companies handle things in different ways.
- ✚ Riders and CSDs....Condition Specific Deductible
- ✚ Talk about money and application. Tell them you will need their SS, ID, and checking account number or routing number.
- ✚ GET DIRECTIONS! This seals the appointment in their mind.

REMEMBER:

You are not a quoting system...you are there to sell them insurance.

Confidence is KEY! Your tone comes across!