

8 Keys to lock in appointment:

1. Make a Friend – Bond & rapport
2. Find the Pain – Need – WHY
3. Qualify – Medical, Build, tobacco, Driving record, Criminal, Travel/Residence
4. CALL from the home to select a product & confirm pricing
5. Present Options
6. Complete application (& phone interview if required)
7. Complete final pages of the ATM (ERS, Greensheet, "Who can help us?")
8. CALL from the home before you leave - "pick up a check and pick up the phone"