

Perfect Life Pivot & Transition Sales Process

PERFECT LIFE PIVOT – TO COMPLETE AFTER ANY CALL

"While I have you on the phone I noticed we don't have a payment protector for you, in case you were sick/hurt & couldn't go to work or God forbid you didn't come home one day. About how much would we need to make a check for to cover all of your debt so that it wouldn't be forced on your loved ones? (Including any mortgages, loans and credit card debt?) Would that be \$100,000, \$150,000, \$500,000?"

Then run the quote for them of a 10YR term for whatever amount that they told you. (or Instant Answer if amount is under \$50K)

"It looks like we could cover that for \$____. Because your insurance is with our office, the payment protector is only going to change your bill by \$____. Because it is so inexpensive, I wanted to see who we should list as your beneficiary?"

Then move to cheat sheets in back of your books.

PIVOTING / TRANSITION SALES PROCESS

Everyone knows it's important to pivot to existing customers. How do you do it though?

1. I was/the agent was reviewing your policy and noticed...
2. I see you have a birthday coming up — Happy Birthday! Where is your...
3. We recently were doing a discount double check and noticed you were missing...
4. Before we hang up, I've been meaning to ask you who insures your...
5. Before I take your payment, I wanted to make sure that you knew that we don't have your _____ coverage in force. It would just be \$_____ to change that & I can take both payments together.
6. By the way, did you see the offer that State Farm sent you?
7. While I have you on the phone, let me ask you who insures your...
8. Okay it looks like we have your car insured, home insured but not your...
9. Oh my gosh! It looks like we may owe you an apology! Most of our customers have their ___ insured with us but it doesn't look like we took care of that for you. I apologize, I can take care of that for you right now.
10. Let me confirm your Lien Holder's and your Mortgagee to make sure we have a payment protector taking care of the balance for you.
11. (When taking a payment or adding a car) In the event you were sick/hurt would you like for SF to cover your payment or do you want to cover it?