

Prospect Potential Customers Booklet



PROSPECT POTENTIAL CUSTOMERS

There are many various ways to prospect potential customers. We feel one of the most effective and successful ways to prospect potential customers is utilizing an existing customer base, whether that be a Medicare book of business or a health insurance book of business, etc.

We feel that this method is one the most effective and successful methods due to the fact that you already have a relationship with these prospects. In turn that will give you the best chance at being able to present the products.

Also, it is proven that by utilizing an existing customer base, closing ratios and average application size are much higher. The number of referral business is also high as well!

However, an existing book of business is not the only effective way to market these products.

On the next page you will find the proper steps needed to contact your potential customer and verbiage used to cross sell a product once you're able to present the product.

INITIAL CONTACT:

Whether you prefer to call your potential prospect or knock on their door, the verbiage listed below is effective in both manners.

(Phone Script)-Existing Customer

Hello, Jed and Ethel. This is (Agents Name) from (Agency Name). How are you today? I hope I haven't caught you at a bad time. The reason for my call today is you folks carry your Medicare supplement insurance through us and I've got some new and important information that I would like to drop off to you folks.

The good news is you will only have to put up with me for about 10 to 15 minutes. I was just wondering would tomorrow at 5:00 o'clock work or would it be better to stop by at 7:00?

Now the response you may get from the prospect is, "What's the new information about?"

Your response to this is:

I'm glad you asked! It's a program called (Policy Name). It works right alongside with your Medicare Supplement Policy. I forgot to mention it when I originally sold you your Medicare Supplement policy. What it does is it helps with the things that Medicare does not cover when you're going through cancer, a heart attack, or stroke.

Like I said, Jed and Ethel, it's mainly just my job to get you the information and you'll only have to put up with me for 10 or 15 minutes. Would you mind if I stop by at 5 o'clock tomorrow night or would 7 o'clock work best?

DOOR KNOCK SCRIPT-EXISTING CUSTOMER

Hello, Jed and Ethel. It's (Agents Name) from (Agency Name). I hope I haven't caught you at a bad time. The reason for my stop is, you carry your Medicare Supplement insurance through me and I have some new and important information to drop off. The good news is you only have to put up with me for about 10 or 15 minutes. Would right now work or would you prefer me to come back this evening?

Now, the response you may get from the prospect is, "What's the new information about?"

Your response to this is:

I'm glad you asked! It's a program called (Policy Name). It works right alongside with your Medicare Supplement Policy. I forgot to mention it when I originally sold you your Medicare Supplement policy. What (Policy Name) does is it helps with the things that Medicare does not cover when you're going through cancer, a heart attack, or stroke. Like I said, Jed and Ethel, it's mainly just my job to get you the information and you'll only have to put up with me for 10 or 15 minutes. Would right now be ok to go through that with you or would later this evening work better?

DOOR KNOCK-NON EXISTING CUSTOMER

Ice Breaker

Hello! You must be Jed and Ethel. My name is (Agents Name) and I am with (Agency Name). I hope I haven't caught you at a bad time. The reason for my stop is I have some important information I'm trying to get out to everyone in (Current County).

The good news is you only have to put up with me for about 10 or 15 minutes. Is now a good time or is it best to stop back by this evening?

Now, the response you may get from the prospect is, "What's this information about?"

Your response to that is:

I'm glad you asked. It's a program called (Policy Name). Now, you may or may not have heard of this Program as many of the folks in (Current County) are involved in this program! As I mentioned earlier, it's just my job to get everyone the information and you will only have to put up with me for about 10 to 15 minutes. Would now be a good time to go through that with you or would you prefer me to stop back by in the evening?

Now, the response you may get from the prospect: "Is this insurance?"

Your response:

Well Jed and Ethel, it is insurance. However, it is nothing like your health insurance or your Medicare that you currently have. In fact, it's better than that and I think that's why so many folks in (Current County) are getting involved with this.

As I mentioned, Jed and Ethel, it's simply just my job to get you guys the information and the good news is you'll only have to put up with me for 10 or 15 minutes. Would right now be OK or should I stop back by at another time?

Notice, in every method used it mentions "the information will only take 10 to 15 minutes." It is very important to mention the time element in the verbiage. The customer needs to hear "10 to 15 minutes" as it stops the customer from thinking that the visit may take hours.

It also shows the prospect that you are being courteous of their time and they will be more willing to sit down and listen to your presentation.

Once the prospect has agreed to listen to your presentation, revert back to the Sales Presentation and start with the **F.O.R.M** Process.

