

Untap Your BOOK OF BUSINESS

1 STEP

SEGMENT & PRIORITIZE

Organize your clients into groups by their value to your business.

A - Highest ranking clients that account for the majority of your business

B - Middle-ranking clients with the potential to grow

C - Clients with the least potential to grow

Proceed through the next steps one group at a time, starting with the "A" clients.

2 STEP

PREPARE

Review your clients' in force policies.

- What policies do your clients currently have in force?
- Are their policies performing as intended?
- What are the current values of the in force contracts?
- Do any of the policies offer a conversion privilege?
- Research current products and industry trends.

3 STEP

RECONNECT

Reach out to clients to build stronger relationships.

- Review their past goals to see if things are on track.
- Provide them with an update on their current coverage.
- Ask if they've had any changes in their lives that would affect their coverage needs.
- Discuss new opportunities and industry news.
- Stay connected with your clients on special days like, holidays, birthdays, etc.

60% of clients said that they would like their coverage reviewed annually

4 STEP

LISTEN

Let your clients lead the conversation and take notes.

- How have their financial goals changed?
- Do they want to pass on a legacy or an estate?
- Are they satisfied with their current coverage?
- Do they have the most competitive product(s)?

5 STEP

REALIGN

Identify your clients' coverage to meet their updated needs.

- Does their current coverage meet their updated needs or are there gaps?
- What's needed to meet their retirement goals?
- Are they prepared for an extended care event?

6 STEP

ASK FOR REFERRALS

The more proactive you are with your clients, the easier it will be to ask for a referral!

Referrals are your best source of new clients!

**For more information
contact us today!**