

In Home Presentation - Referral

Main Objectives:

1. Build a bridge and create more opportunities for referrals
2. Close the Sale

Two Types of Referrals:

1. Get To The Point (Know that they need service)
2. Set the appointment strictly on credibility of nominator/referee (Favor)

In The Home:

1. Refer to the steps in getting the original referral
 - *Rapport Building - Use things from the nominator/referee to strengthen trust.

At The Kitchen Table

(Have the referral sheet & CQ form out)

1. Show gratitude for their time (Not the appointment)
2. Explain your role and purpose
3. Set them up to get a Client Qualification Form
 - a. Your goal is to show value create enough trust for them to move into filling out a CQ form

Script (Mortgage Protection)

_____ & _____, when sitting down with (Nominator/Referee) they though that you most likely had plenty of life insurance outside your job but with the changes in the mortgage industry they though it might be helpful to educate you on how mortgage protection works.

* Quick question, how much life insurance do you have outside your job?

1. Move into the Client Qualification Form
2. Transition into your regular Mortgage Protection Presentation

Script (No Mortgage)

_____ & _____, when sitting down with (Nominator/referee) they thought that you most likely had plenty of life insurance outside your job but probably never had a chance to shop around and make sure you had the highest amount of coverage for the lowest price.

*Quick question, how much life insurance do you have outside of your job?

1. Move into the Client Qualification Form.
2. Transition into your regular Mortgage Protection Presentation