



Habit 7: Wrap-up & Policy Prep

Your last impression is...lasting. Think of movies & books: a bad ending can ruin the whole thing. Conversely, a great Presentation closing can overcome prior flaws & cement the sale.

Up to this point, the tone of the call has been professional and authoritative. Here, you have an opportunity to **connect on a more personal level** and your customer should feel like they have secured their new Life Insurance Agent for today and the future. Bottom-line: they're done shopping and they're moving forward with no "buyer's remorse."

To make sure the policy "hits the books", you need to use "tie-downs" for all of the customer's next steps. While still courteous, your approach needs to be both instructive and directive. Literally tell them what happens next, what's expected of them & when they need to get it done.

For all the requirements, remember, you're *giving* Information and *getting* Confirmation:

1. Spin all the positives & make them aware that you're doing most of the work.
2. Try the "whisper" effect when giving tips on taking the exam or binding.
3. Define time-lines & create urgency with b-day, need, save age, savings, etc.
4. Provide a final recap of their new coverage. Be specific and make the coverage "Real."
5. Give your name again and whisper your extension number.
6. Offer to have the PI or beneficiary call anytime with questions.
7. Remind them again about your case management team. Sound big.
8. Ask for referrals. "Who else can I help save money..." It's Old-school but it works.
9. Thank them for their business.
10. Use a great last line that's positive and directive (see attached Agent Closing Lines).

When you master Habit 7 (along with the other 6 Habits), the last thing your customer should say is... **Thank you!**

(Celebrate for 3 seconds...and now go write another Tele-sale!!)