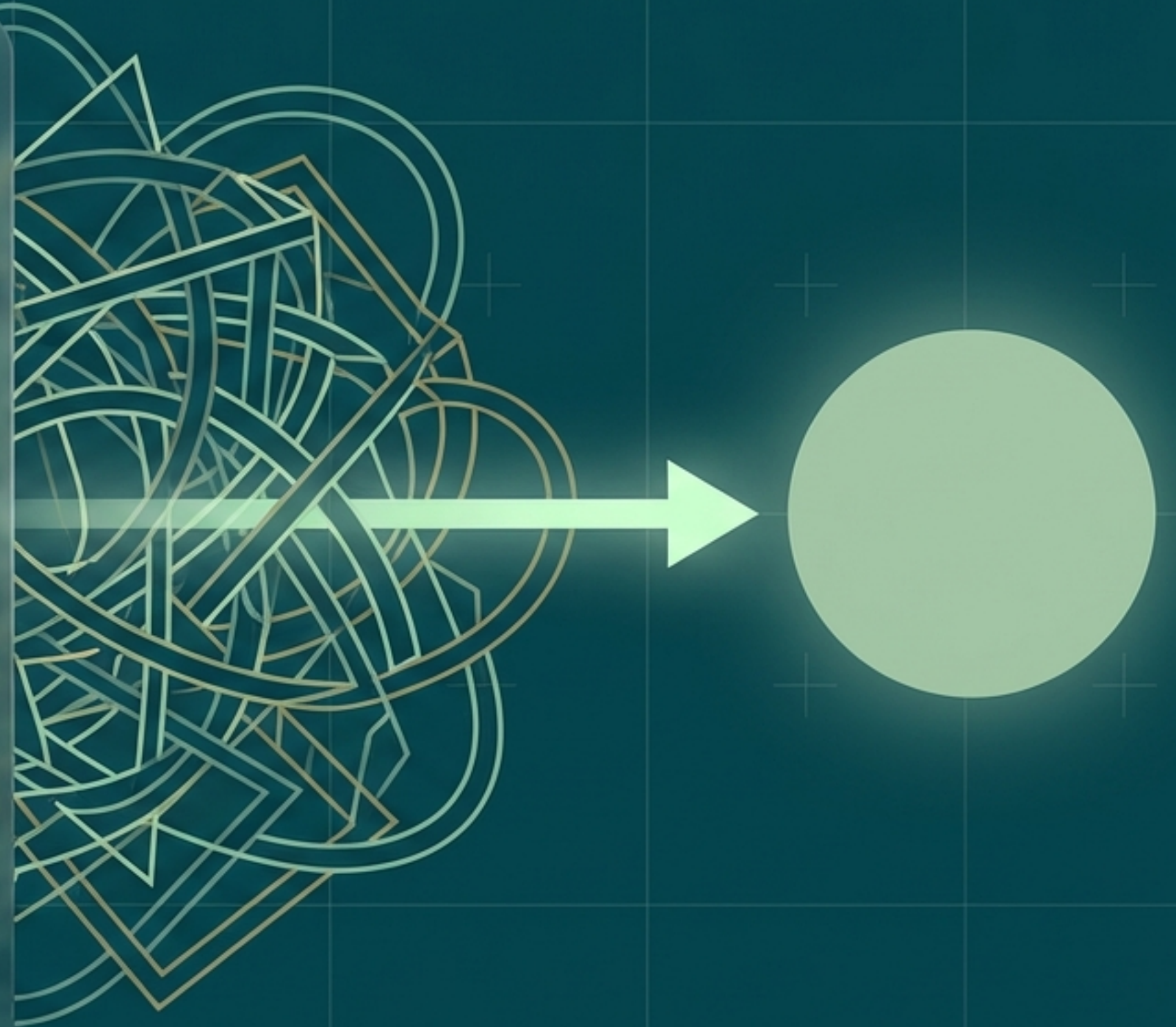


# Explain Plans Without Overwhelming

# The Knowledge Trap

You lose the client because you know too much.

**Goal:** Make the decision feel simple.



# Too Many Choices Create Paralysis



5 plans create confusion



2 plans create clarity

# Rule 1: Two Options Only

Narrow the field based on the needs assessment.  
Present two genuine fits. Let them choose.

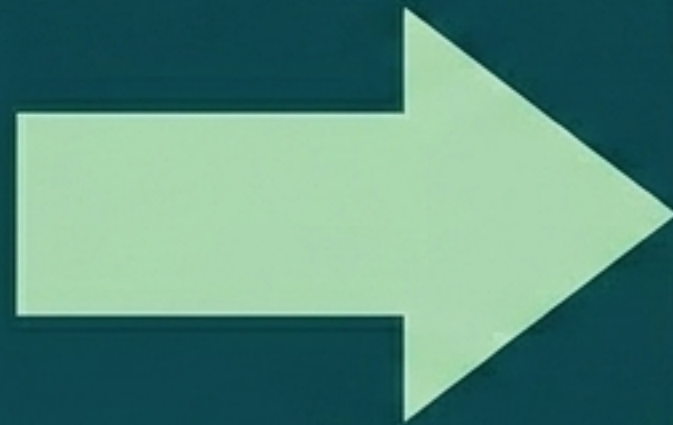


# Rule 2: Connect Features to Reality

Nobody cares about abstract features until they know the personal impact.



Abstract Feature



Real Life Impact

# Translate to Their Reality

## Abstract Feature



\$200 specialist  
copay



## Real Impact



Each visit to your  
cardiologist costs \$40

How To Do It

## Rule 3: Use Plain English



Coinsurance

You pay a portion,  
Medicare pays the rest

Formulary

The list of your covered  
medications

## Rule 4: Client Sets the Depth



**Give them permission to not understand everything.**

- Read the room

- Provide the bottom line

- Handle details on your end



# Eliminate the Mental Math

Words force the client to hold unfamiliar information in their head.



<input checked="" type="checkbox"/>	Item 1	Value 1 
<input type="checkbox"/>	Item 2	Value 2 
<input type="checkbox"/>	Item 3	Value 3 

Visuals make the decision **obvious**.

# Your Role in the Appointment



**Step 1:  
Curate**



**Step 2:  
Simplify**



**Step 3:  
Guide**

Example

# The Walkthrough Script

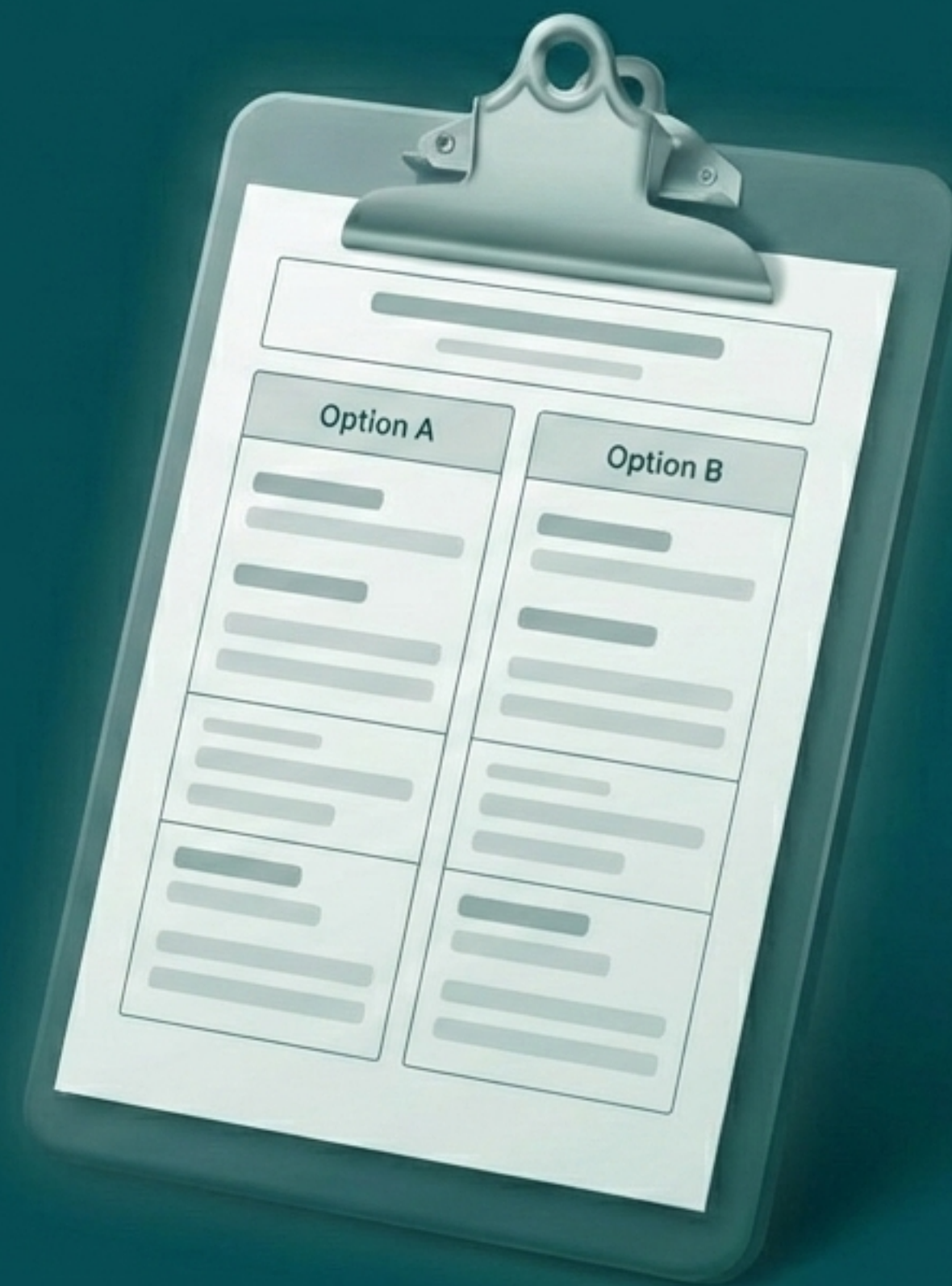


Based on your doctors, your prescriptions, and your budget, I narrowed it down to two plans that fit. Let me walk you through how each one works for you specifically.

Action Step

# Build Your Comparison Template

Create a simple 1-page visual tool to use at your next appointment.



Action Step

# The 1-Page Layout

Two columns. Rows for real numbers:

- ✓ Monthly premium
- ✓ Doctors covered
- ✓ Medication costs
- ✓ Estimated annual cost