

Your First Insurance Appointment - What to Expect

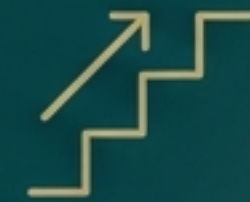
The Reality of Your First Appointments

- They will feel awkward

- You will forget something

- You might stumble over a comparison

This is
completely
normal.



The Differentiator

The difference between agents who make it and agents who quit is not talent.

It is showing up prepared and doing the appointment anyway.

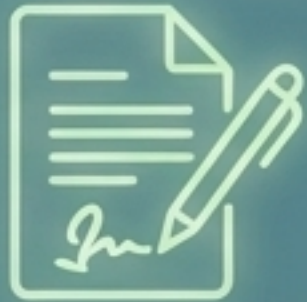
Three Things to Prepare

1



Technology: Laptop loaded with quoting tool for their zip code

2



Compliance: Scope of Appointment form ready to sign

3



Note-taking: Legal pad to document doctors, drugs, and budget

Minutes 0 to 3



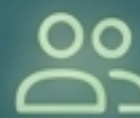
You are not selling yet.



Notice the environment



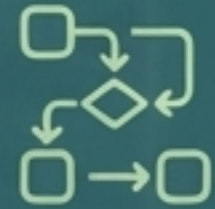
Make a genuine
observation



Become a person they
are comfortable with

Step 2: Framing the Roadmap

Structure



Tell them exactly
how the meeting
will flow



Safety



Confirm there is no
pressure and no
obligation

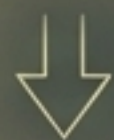
Step 3: Needs Discovery



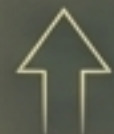
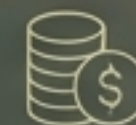
Step 4: Presenting Quotes



Turn your screen toward the client.



Lower Premium + Higher Copays



Higher Premium + Capped Copays



Speak in plain language. Never rush to close.

Step 5: The Enrollment Process

10 Minutes

Complete application together

2 Weeks

Confirmation packet arrives by mail

1st of Next Month

New coverage officially begins

The Fatal Mistake



The Laptop Trap

Opening your screen and presenting plans before the client has spoken



The 10-Minute Rule

Keeping the laptop closed while listening and establishing needs

The Transition Framework

I appreciate you taking the time. Here is how this works. I am going to ask you a few questions, and based on what you tell me, I will show you the options that make the most sense.

There is no pressure. If something is a good fit, great. If not, that is totally fine too.

Your Action Step

Do a complete dry run out loud.



Say the framing language



Practice the transition



Navigate your quoting tool

Walking through it beforehand lets you focus on the client, not the process.