

Prospecting Game Plan

FINAL EXPENSE

The most important part of your success with IntelOne Financial Partners as a Final Expense Specialist/Underwriter will be determined by one activity... prospecting. If you can master this one skill, you will virtually guarantee yourself a lucrative and long lasting career with us.

There are a couple things you must know in order to be successful in the final expense market. It's important when working with seniors that you wear an official IntelOne ID badge. Wear it with pride, and display it at all times. It really does put people more at ease when they understand they are dealing with a professional who is clearly identified as such.

There are several ways to prospect in the final expense market. We take the most difficult part of prospecting... finding qualified seniors... out of your hands, so that you can focus the majority of your time and effort on sales.

Our direct mail leads are the best in the industry. Every one of these leads represents a senior who has a need and had a "moment." Had you been there in that moment, they would have purchased from you right then and there. The key to your prospecting is to get in front of them as quickly and as easily as possible, so that you can get them back in the moment when they filled out the lead.

There are two primary ways to prospect, and they both work well.

The first way to prospect is to just get out and see them. Take your leads, and simply knock on their doors. One of the great things about Final Expense is that you can work in the mornings and afternoons with great success, leaving you, the agent, more personal time in the evenings for family and friends.

Mid-morning is the best time to head out and meet these people. You'll find the majority of them will be home, very receptive to you, and you'll be able to sit down with them and take care of their needs immediately.

When you do this, or at any time you meet with people in the home, again, you should always wear and prominently display your IntelOne ID badge.

A second way to prospect in this market is by telephone. When setting final expense appointments by phone, you want to make sure the appointment is never more than a day away.

For instance, if you're calling this morning, it should be to set appointments for later today or tomorrow.

This will help avoid no shows.

At IntelOne, we know that prospecting will largely determine your success. With our direct mail leads and sales system, you will spend the majority of your time in front of clients instead of trying to find someone to talk to.