ANNUITY OPERATORS

QUALIFYING CALL GUIDELINES

How to run call 1

CORE RULES

DO NOT lead with products.

70/30 Rule (client talks 70 percent, agent 30 percent).

Don't move forward until you get the info you need. (If they give you a surface-level or short answer, follow up with "Tell me more about that" or "Why is that?")

Main goal for call 1 is to secure call 2. NOT to sell any products.

Use micro commitments throughout the call to make the close (setting the second call) sound less salesy. EX: "Would you say this is something you feel like you decided you want to address?"

4 parts to the call:

- Framing
- Discovery
- Present
- Close (setting call 2)

Spend the majority of your time in discovery, since that is where your close is really made.

If you are on Zoom: nice professional background (blank wall, bookshelf, office space), wear a collared shirt or button-down.

Second goal for call 1 is to make the client feel a sense of urgency with their concerns, but feel like you can help them solve them.

Use the script as a framework and always follow your best judgment on the situation to feel what is best for that specific client.

Match the client's tone and pacing. If they talk slower, SLOW down; if they are quicker, go at your normal talking pace.

TEMPERATURE CHECKS

Use temperature checks throughout your presentation to make sure the client is on board with what you're covering, and to progressively build agreement as you move toward the close. Ask, then pause and let them answer fully.

Examples:

- "Am I heading down the right path with this?"
- "Would you agree that [XYZ] would be at least somewhat helpful for you guys?"
- "On a scale of 1–10, with 1 being 'this doesn't relate to me at all' and 10 being 'this feels super relevant,' where would you say you are?"
- "Is there anything I've shown so far that you really don't like?"
- "How does this compare to the way you're handling it now?"
- "Does this solve the [problem] you mentioned earlier, or only part of it?"
- "What would it take to get you closer to a 10?"