



PURPOSE: To create a great first experience, eliminate confusion, build trust, and open the door for long-term relationships—while making sure every family is properly protected.

1
STEP



WELCOME

Create a great first impression.

Suggested Conversation:

“First, thank you for trusting us. We’re excited to have you as part of our insurance family. Our job is to help protect your family, finances, and future.”



2
STEP



GET CONNECTED

Make sure they have everything they need.

- | | |
|---|---|
| ☐ Documents Received | ☐ Billing Questions Answered |
| ☐ App Downloaded | ☐ Policy Questions Answered |
| ☐ Online Account Setup | |

Reassure them:

“We never want you wondering who to call or what something means—that’s what we’re here for.”

3
STEP



PROTECT THE FAMILY

Look for opportunities to fully protect them.

- ☐ Life Insurance
- ☐ Health Insurance
- ☐ Family Protection Review

CONVERSATION STARTER:

“I noticed you don’t currently have life or health coverage with us. One of the things we do really well is help families make sure they’re fully protected—not just their car or home.”

“Would it be okay if I set up a time for you to meet with our Family Protection Specialist? They do a great job keeping it simple and making sure nothing important is missed.”

(Keep it helpful. No pressure. Mission-focused.)

4
STEP



BUILD THE RELATIONSHIP

Offer to meet with Bert.

“Would you like to meet with Bert either sometime soon or before your first renewal? He likes to personally meet our clients and make sure everything is lined up the way it should be.”



5
STEP



FINISH STRONG

Leave them confident and cared for.

“Thank you again for the opportunity to serve you. If you ever need anything—questions, changes, or just advice—we’re here for you.”

Welcome to the family.”



STANDARD OF EXCELLENCE

Every customer receives...



THE SAME
PROCESS



THE SAME
CARE



THE SAME
PROFESSIONAL
EXPERIENCE



EVERY
TIME

This is how we **build trust**, **increase retention**, and **protect families and futures**.