

FAST SERVICE CONVERSATION GUIDE

— HELPING PEOPLE. STRENGTHENING RELATIONSHIPS. CREATING OPPORTUNITIES. —

F
FOLLOW UP



STAY CONNECTED

- ☐ Have you set up your online account and opted in for email and text updates?

Keeps customers connected, informed, and in control.



A
ASK



DISCOVER OPPORTUNITIES

- ☐ Have there been any major life changes recently?

 Marriage
  New Baby
  New Home
  New Driver
  Job Change

- ☐ Have you changed jobs in the past five years?

S
SERVE



PROTECT WHAT MATTERS MOST

- ☐ Do you own or rent your home?
☐ Do you have life insurance through work?
☐ Are you currently doing anything to plan or save for retirement?



T
TAKE ACTION



CREATE THE NEXT STEP

- | | |
|--|--|
| ☐ Schedule a Review | ☐ Set Follow-Up Activity |
| ☐ Refer to a Producer | ☐ Celebrate Another Opportunity to Help Someone |
| ☐ Update Customer Information | |



BUILD RELATIONSHIPS
People do business with those they trust.



DISCOVER OPPORTUNITIES
Ask the right questions. Listen. Learn.



PROTECT WHAT MATTERS MOST
Help customers protect their families, homes, and futures.



HELP PEOPLE
It's why we do what we do.