

The Ride Report

The Ride Report					
Goals					Comments
Written Goals On Display		Y	N		
Discusses Goals For The Day		Y	N		
Field Preparation					Comments
Professional Appearance	1	2	3	4	
Enthusiastic	1	2	3	4	
Success Audio In Vehicle	1	2	3	4	
Work Ethic					Comments
Door Knocks During Prime Time	1	2	3	4	
Makes Calls At Prime Times	1	2	3	4	
Works With A Purpose	1	2	3	4	
Intro					Comments
Uses External Clues	1	2	3	4	
Uses Lead Card To Validate	1	2	3	4	
Builds Rapport	1	2	3	4	
Finds Out How They Heard About Us	1	2	3	4	
Presentation (Specifics)					Comments
Company Story	1	2	3	4	
Explains Benefits with WIIFM	1	2	3	4	
Builds Value In Insurance vs Burial Plan	1	2	3	4	
Asks For Meds and ID Before Worksheet	1	2	3	4	
Identifies Current Policies / Reviews Policy	1	2	3	4	
Speaks Negatively About Competitors	1	2	3	4	
Identifies All Health Issues In Detail	1	2	3	4	
Presentation (General)					Comments
Uses Customer Name	1	2	3	4	
Leads Client With Questions	1	2	3	4	
Uses Body Language and Voice Inflection	1	2	3	4	
Takes Notes While Client Speaks	1	2	3	4	
Listens Attentively	1	2	3	4	
Owens The Room	1	2	3	4	
Minimizes Use Of Disfluencies	1	2	3	4	
Uses Tie Downs Through Presentation	1	2	3	4	
Checks For Understanding	1	2	3	4	
Follows Script Process Exactly	1	2	3	4	
Sells On Benefits Not Features		Y	N		
Offers Additional Riders		Y	N		
Presentation (Post Sale)					Comments
Assumes The Sale	1	2	3	4	
Explains Timelines (Payments)	1	2	3	4	
Top Down Selling	1	2	3	4	
Overcomes Objections Smoothly	1	2	3	4	
Calls Upline If No Sale		Y	N		
Sets Client Up On Social Security Billing		Y	N		
Asks For Referrals		Y	N		
Applications Completed (Paper or E-App)		Y	N		
Completes Membership Form		Y	N		
Post Sale					Comments
Updates CRM Before Pulling Off		Y	N		
Reports To GoupME		Y	N		
Agent _____			Trainer _____		Date _____
Presentations _____			Sales _____		AP _____