PRESENTATION TIPS

Conversations Drive Final Expense Success

1. Conversations, Not Scripts

Prospects decide about you before they decide about a policy.

Trust precedes transactions.

When the tone is calm, steady, and respectful, resistance drops naturally.

2. Why This Works (Psychology)

Human decisions follow this order:

Trust → Safety → Logic → Action

If trust is missing, logic does not land.

Most hesitation is emotional processing, not financial objection.

When you slow down and listen, you lower psychological defenses.

3. Opening the Conversation

- Reference why they requested information
- Ask one open-ended question early
- Pause and listen fully
- Mirror their tone and pace

Example:

Agent: “Ms. Betty, what prompted you to look into this today?”

Ms. Betty: “I don’t want my kids handling expenses.”

Agent: “That makes perfect sense. Let’s look at something simple and affordable that handles that responsibility.”

4. Text Strategy

Initial Response Text:

"Hi Ms. Betty, this is Dan. You requested information about final expense coverage. I'll be calling shortly from this number."

Post-Conversation Recap:

"Thank you for speaking with me today. I'm here if any questions come up while you think it over."

5. Voicemail Framework

- Keep messages 20–30 seconds
- State your name clearly
- Mention their request
- Invite them to return the call
- Limit to 2–3 spaced messages

6. Handling "I Need to Think About It"

Respond calmly:

"Of course. May I ask — is there something specific you'd like to review or a question I haven't answered clearly?"

This keeps the conversation open without pressure.

7. Gentle Close

Agent:

"Based on what you've shared, this protects your family and keeps the payment
comfortable. Shall we go ahead and secure it today?"

When trust is built properly, the close feels natural — not forced.

END PRESENTATION TIPS