



COFFEE

Post Appointment Process

Setting yourself up for success

The end of an
appointment is the
beginning of a
relationship



Don't let the trust you built
in an appointment
deteriorate with lack of a
post appointment plan

Once you leave an appointment what happens?

Feel happy about earning a new client?
Patting yourself on the back for helping put the right solutions in place?

You should! Awesome job helping that client and earning their trust. But...

What happens that next week?
Month?
Quarter?

Not having a post sales appointment process:

- Slowly erodes that trust in you as an agent
- Opens the door to other agents
- Reduces your book of business
- Reduces your residual income
- Eliminates the opportunities for referrals

Let's change that... 

What does a post appointment process look like?

This does not have to be an overcomplicated process. Example:

1. Send out a handwritten thank you card
2. Input information into the CRM
3. Add to the email distribution list
4. Enter follow-up appointment on the calendar



That is so simple!

I know! Keeping the process simple ensures consistency which is the key to putting an efficient system in place!

When do I start doing this?

Yesterday. Or now. But the longer you wait the more behind and the more work this will take.

How do I do it?

There is no right or wrong way, as long as you are going it. Example: You can use a check list you use for your post process for each client.



TARGET:

You should have 7 client touches per year!

Other Ideas:

- Encourage your clients to “like” your Facebook page
- Birthday Cards
- Holiday Greetings
- Client Appreciation Events
- Annual Reviews

What to do next:

Set up your process!

Make sure you are building a relationship and not just processing a one time sale.

Need help creating your Post Appointment Process? [CLICK HERE](#) or call (800) 689-2800 and speak to your sales director!

Senior Marketing Specialists has numerous resources to help you grow and succeed in the senior market. Here are just a few:

[Quote Engine](#)
[SMS Agent Connect](#)
[Marketing Materials](#)

[SMS Events](#)
[SMS University](#)
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Tuesdays at 10:00 am

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