



# 7 Fundamentals

Qualification Cards

# #1 Prospecting



Picking up a name and number: \_\_\_\_\_

Always developing my own list: \_\_\_\_\_

How to Ask/Send Video: \_\_\_\_\_

Ask for Recruiting and Client Referrals: \_\_\_\_\_

Questions to peak interest in what I do? \_\_\_\_\_

Inviting to Seminars: \_\_\_\_\_

## 2. Setting Appointments - Office or Zoom



Follow up for video - book zoom: \_\_\_\_\_

Booking any appointment: \_\_\_\_\_

Booking appts from reference checks: \_\_\_\_\_

Booking appointments for new recruits: \_\_\_\_\_

Booking appts from other referrals: \_\_\_\_\_

# Presentation



Know the video contents: \_\_\_\_\_

600 conversation: \_\_\_\_\_

Three boxes: \_\_\_\_\_

Mobile FNA: \_\_\_\_\_

Theory of Decreasing Responsibility: \_\_\_\_\_

# Handle Objections



Watch and Learn the overcoming objections videos on POL: \_\_\_\_\_

TDR - for whole life/term: \_\_\_\_\_

Recruiting Objections: \_\_\_\_\_

Questions to overcome objections: \_\_\_\_\_

# Know the Products - Life Boot Camp and Sec Sat.



Life Insurance: benefits, our terms , other's products

Mutual Funds: types of funds, IRAs, 401Ks, index vs. active

# Excel at KT Recruiting



Getting Recruiting Referrals at KT: \_\_\_\_\_

Recruiting to shortfall/ wants and needs: \_\_\_\_\_

# Get Your new Recruit off to a Fast/Great Start



Get the why: \_\_\_\_\_

Get the coaching commitment: \_\_\_\_\_

Reference list: \_\_\_\_\_

+ Appts from Reference List: \_\_\_\_\_

Full lists: \_\_\_\_\_

+ Appointments from Full list: \_\_\_\_\_

Get the person licensed: \_\_\_\_\_

Get new recruit a fast start bonus: \_\_\_\_\_

Build Relationships: \_\_\_\_\_