



Real Talk: Meeting Prep

Your thinking partner for the conversations that matter



How It Works

Persona: HR Director

Situation: Preparing to meet for 1st time with benefits broker

Request to Real Talk: "I'm an HR Director and will be meeting with an insurance broker who is interested in becoming our new broker. How should I prepare for this meeting? What does an insurance broker do? What are the questions I should ask?"

STEP 1: Real Talk provides a multi-page meeting preparation guide for you that includes:

- What insurance brokers do and how they add value
- 60+ strategic questions organized by category (experience, service model, costs, compliance, technology, compensation)
- Red flags and green flags to watch for
- A suggested meeting structure with opening and closing statements
- A post-meeting scorecard to objectively evaluate candidates
- Confidence builders to help you feel empowered

STEP 2: Follow up question "Let's Prepare Further - what would be most helpful for you right now?"

- Practice your opening statement - Would you like to rehearse how you'll frame the meeting?
- Customize your question list - Should we prioritize certain questions based on your specific challenges or company size?
- Role-play scenarios - Want to practice responding if they dodge questions or give vague answers?
- Create a follow-up email template - For after the meeting to maintain professionalism?

Try it here: velvetcubicle-meetingprep/appy.ai