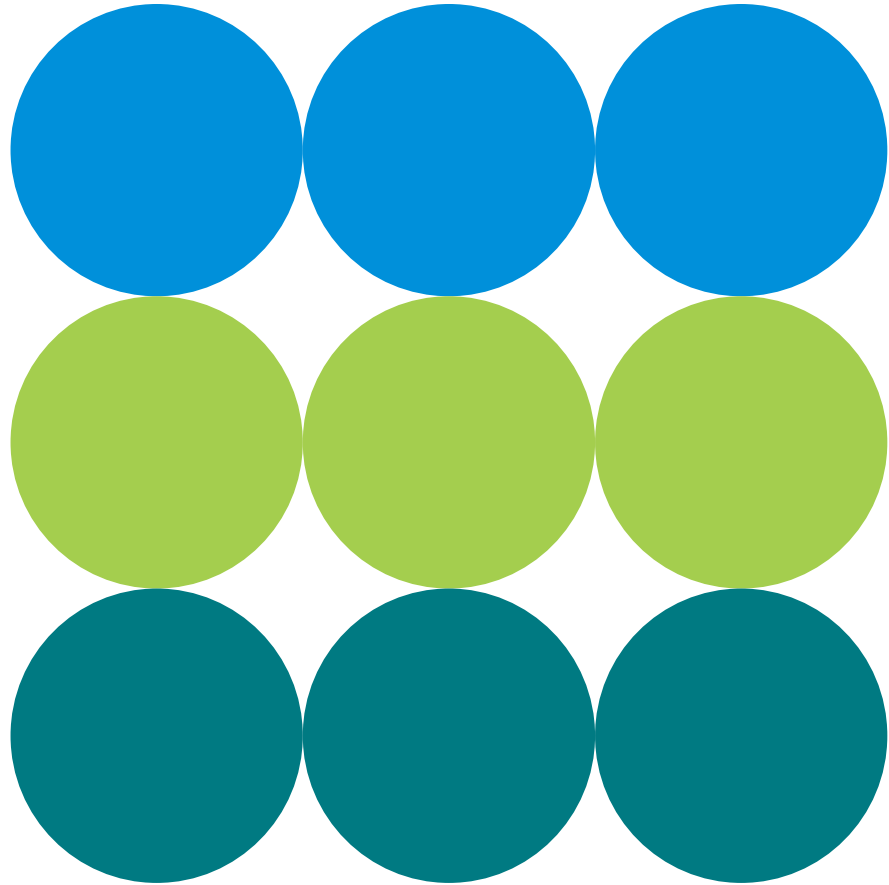




Pre-Approach & Approach





Pre - Approach

What is Pre-Approach?



Pre-approach means:

“getting ready to meet a prospect by collecting more detailed information about him”

At the pre-approach stage, the agent tries to collect some more information in addition to the information gathered at the initial prospecting stage. Such additional information about the prospect can include:

- Aspirations
- Lifestyles
- Preferences
- Business Nature and Behavior
- Financial status
- Family

Importance Of Pre-Approach



Pre-approach benefits:

Gathering important information about the prospect will significantly help you to determine the right way to approach him, in other words to determine the right approach!

1. A wise agent through his pre-approach stage attempts to decide:

A. what is the right place for meeting the prospect?

Based on the information you have collected about the nature of your prospect work and life style, is it proper to meet him at his work?, maybe meet him somewhere outside, or maybe invite him at your office?

B. When is the right time to meet the prospect: Is it better to meet him during his working hours or maybe before/after his working hours ?

C. What is the appropriate dressing code and outfit that is suitable for meeting the prospect ?

For example, If you are making a sales call to a construction site, you would not wear a full business suit!



Importance
Of
Pre-Approach

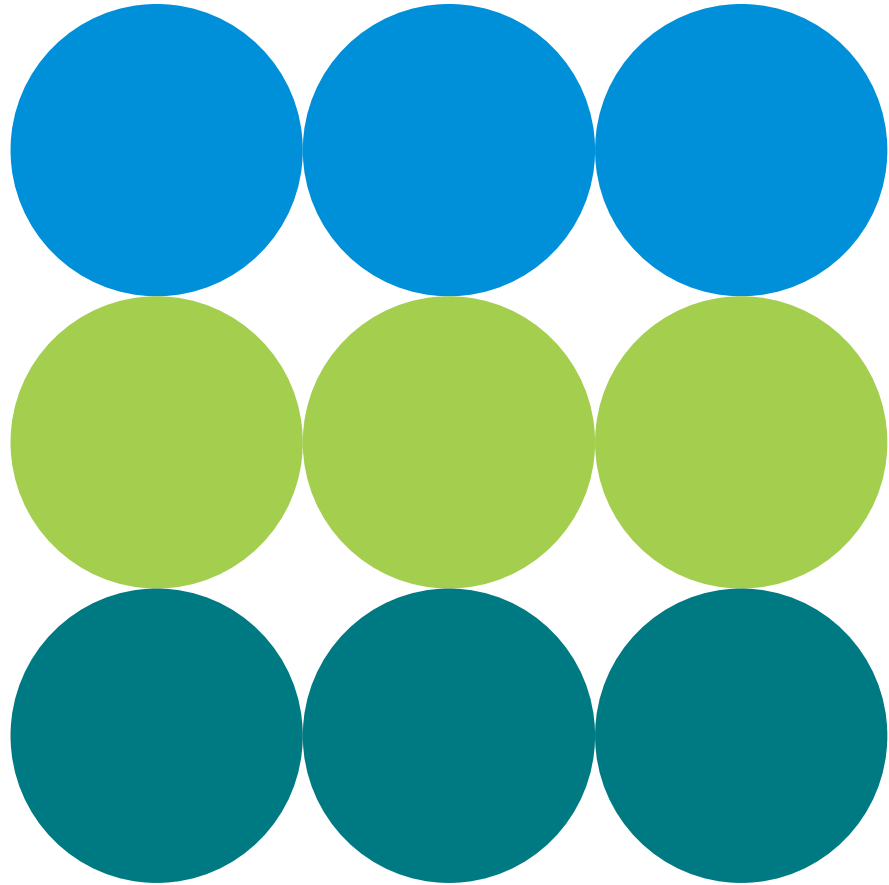
Pre-approach benefits:

- D. What is exactly needed to plan the sale movement intelligently :
 - ✓ How you will initiate the first contact and what is the contact strategy?
 - ✓ What are the meeting objectives?
 - ✓ What are the needed preparations? (Materials, Technology ...)
2. Gathering important information about the prospects will significantly help the agent to influence their buying behavior through well-planned sales presentation.

“In other words, Pre-Approach is all about planning for the Right Approach”

“The Right Approach defines the ability to meet the prospect at the right time at the right place in a well prepared shape”

“The Right Approach will put the agent in a position to present his products / services in conformity with the need of the buyers and with high level of self-confidence”



Approach

Approach

“How you approach your prospect in a sales pitch in terms of attitude, appearance, knowledge, skills and suitable customized solution will determine your success.”



Approach

Getting in the Door

A prospect's reactions to the agent in the early minutes of the meeting are crucial to a successful sale. Therefore, the first impression you make is very critical.

During this stage, you should be able to capture the attention of your prospect, therefore what you need is an engaging conversation to attract him using your elevator pitch.

- You should prepare a customized elevator pitch to quickly attract the prospect to view the product offered as the solution to his needs. The elevator pitch simply defines a product, service, or organization and its value proposition.
- **The term “elevator pitch” reflects the idea that it should be possible to deliver the summary in the time span of an elevator ride, or approximately thirty seconds to two minutes.**



Approach

The Importance of First Impressions

“First impressions are vital to making a successful sales call”

- Showing genuine but tempered enthusiasm about what you do and how you do it (your company, your service), making eye contact, and actively listening to whomever you come in contact with are just a few suggestions that will create a good impression.
- **Paying attention to your outfit and how you dress is also important to create a good impression.**
- The average agent will always have a natural negativity toward approaching someone new, however being comfortable while approaching new prospect is critical to your success in sales.



Approach

Identifying the buying cycle of your prospect:

“ Understand and determine the framework of your sale!”

- **Attention:**

How you will grab the attention of your prospect and attract him through creating a good first impression using a solid purpose statement is vital to the rest of your sale framework, it will help in creating the needed awareness of your prospect regarding what you do and what you will be offering him .

- **Interest:**

This is the most crucial stage in your approach, where you start boosting your prospect's interest level in your product (getting him to like it).

Once your prospect is aware of what you do and the purpose of your meeting, it is time to start impressing him with your product benefits, then focus on clarifying how life insurance product solves your customers problems and satisfies their needs (your product message).

“If your prospect feels that your product has no meaning for him, he'll never reach the purchase stage”

Approach

Identifying the buying cycle of your prospect:

“ Understand and determine the framework of your sale! ”

- **Desire:**

After getting the prospect interested in your product, the goal now is to make him desire it !
In other words moving his mindset from “**I LIKE IT**” to “**I WANT IT**”.

Start framing your discussion about your product features and advantages in a way that is more personalized for your prospect needs, and show him exactly how he will benefit from it.

- **Action:**

Now your prospect is convinced that your product / service is something that he really needs, and will successfully solve his problems, it is time to persuade him to take action!
This is where you help your prospect to say **YES** and turn him into a **CLIENT**.





Navigating life together