

|                         |          |      |
|-------------------------|----------|------|
| Name                    |          | Date |
| Position                | AO/AD    |      |
| Evaluation Completed By | Position |      |

## 1. Gatekeeper

|  |                   |   |   |   |   |   |
|--|-------------------|---|---|---|---|---|
| <ul style="list-style-type: none"> <li>• Rapport</li> <li>• Asking for the Decision Maker</li> <li>• Disengage</li> <li>• Answer Gatekeeper Questions</li> </ul> |                   | 1 | 2 | 3 | 4 | 5 |
|  | <b>Content:</b>   |   |   |   |   |   |
|  | <b>Fluidness:</b> |   |   |   |   |   |

**Comments and Recommendations for Improvement**

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## 2. Decision Maker

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|--|-------------------|---|---|---|---|---|
| <ul style="list-style-type: none"> <li>• Rapport using research</li> <li>• Introduction to the Decision Maker             <ul style="list-style-type: none"> <li>– Tie-down</li> </ul> </li> </ul> |                   | 1 | 2 | 3 | 4 | 5 |
|  | <b>Content:</b>   |   |   |   |   |   |
|  | <b>Fluidness:</b> |   |   |   |   |   |

**Comments and Recommendations for Improvement**

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## 3. Objections Before the Presentation

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| <b>A. I'm not interested.</b> <ul style="list-style-type: none"> <li>• Rebuttal             <ul style="list-style-type: none"> <li>– Tie-down</li> </ul> </li> </ul> |                   | 1 | 2 | 3 | 4 | 5 |
|  | <b>Content:</b>   |   |   |   |   |   |
|  | <b>Fluidness:</b> |   |   |   |   |   |

**Comments and Recommendations for Improvement**

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| <b>B. I don't have time.</b><br><ul style="list-style-type: none"> <li>• Rebuttal</li> <li>– Tie-down</li> </ul> |                   | 1 | 2 | 3 | 4 | 5 |
|  | <b>Content:</b>   |   |   |   |   |   |
|  | <b>Fluidness:</b> |   |   |   |   |   |

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| <b>Comments and Recommendations for Improvement</b> |
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| <b>C. Is this like XYZ Company?</b><br><ul style="list-style-type: none"> <li>• Rebuttal</li> <li>– Tie-down</li> </ul> |                   | 1 | 2 | 3 | 4 | 5 |
|   | <b>Content:</b>   |   |   |   |   |   |
|   | <b>Fluidness:</b> |   |   |   |   |   |

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| <b>Comments and Recommendations for Improvement</b> |
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| <b>D. Send me an email.</b><br><ul style="list-style-type: none"> <li>• Rebuttal</li> <li>– Tie-down</li> </ul> |                   | 1 | 2 | 3 | 4 | 5 |
|   | <b>Content:</b>   |   |   |   |   |   |
|   | <b>Fluidness:</b> |   |   |   |   |   |

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| <b>Comments and Recommendations for Improvement</b> |
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| <b>E. My employees wouldn't be interested.</b><br><ul style="list-style-type: none"> <li>• Rebuttal</li> <li>– Tie-down</li> </ul> |                   | 1 | 2 | 3 | 4 | 5 |
|  | <b>Content:</b>   |   |   |   |   |   |
|  | <b>Fluidness:</b> |   |   |   |   |   |

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| <b>Comments and Recommendations for Improvement</b> |
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| <b>F. We've tried this before.</b><br><ul style="list-style-type: none"> <li>• Rebuttal</li> <li>– Tie-down</li> </ul> |                   | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> | <b>5</b> |
|  | <b>Content:</b>   |          |          |          |          |          |
|  | <b>Fluidness:</b> |          |          |          |          |          |

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| <b>Comments and Recommendations for Improvement</b> |
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| <b>G. We already have benefits.</b><br><ul style="list-style-type: none"> <li>• Rebuttal</li> <li>– Tie-down</li> </ul> |                   | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> | <b>5</b> |
|   | <b>Content:</b>   |          |          |          |          |          |
|   | <b>Fluidness:</b> |          |          |          |          |          |

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| <b>Comments and Recommendations for Improvement</b> |
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## 4. Benefits Fact Sheet

|  |                   |          |          |          |          |          |
|--|-------------------|----------|----------|----------|----------|----------|
| <ul style="list-style-type: none"> <li>• Rapport</li> <li>• Transition</li> <li>• Interactive</li> <li>• Tie-down</li> </ul> |                   | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> | <b>5</b> |
|  | <b>Content:</b>   |          |          |          |          |          |
|  | <b>Fluidness:</b> |          |          |          |          |          |

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| <b>Comments and Recommendations for Improvement</b> |
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| 5. Presentation    |                          |                          |                        |
|--------------------|--------------------------|--------------------------|------------------------|
|                    | Transition               | Tie-down                 | Slide Content Comments |
| Discount Card      | <input type="checkbox"/> | <input type="checkbox"/> |                        |
| ADB                | <input type="checkbox"/> | <input type="checkbox"/> |                        |
| Needs Planner      | <input type="checkbox"/> | <input type="checkbox"/> |                        |
| Group Term         | <input type="checkbox"/> | <input type="checkbox"/> |                        |
| Survivors Benefits | <input type="checkbox"/> | <input type="checkbox"/> |                        |
| Cancer             | <input type="checkbox"/> | <input type="checkbox"/> |                        |
| Critical Illness   | <input type="checkbox"/> | <input type="checkbox"/> |                        |
| Accident           | <input type="checkbox"/> | <input type="checkbox"/> |                        |
| How It Works       | <input type="checkbox"/> | <input type="checkbox"/> |                        |

| Fluidity                      |
|-------------------------------|
| Pen Use:                      |
| Pace:                         |
| Volume:                       |
| Voice Inflection:             |
| Presentation Squared with DM: |
| Confident:                    |
| Eye Contact:                  |
| Use of DM's Name:             |
| Interactive with DM:          |
| Head Nodding:                 |
| Other:                        |

| Benefits Fact Sheet Info Used in Presentation Comments |
|--|
| <input type="checkbox"/> Deductible                    |
| <input type="checkbox"/> Max Out-of-Pocket             |
| <input type="checkbox"/> Group Life Insurance          |
| <input type="checkbox"/> Other                         |

| 6. Closing  |                   |   |   |   |   |
|---|-------------------|---|---|---|---|
|   | 1                 | 2 | 3 | 4 | 5 |
| <ul style="list-style-type: none"> <li>Closing Question</li> <li>Solidifying the Close</li> </ul> | <b>Content:</b>   |   |   |   |   |
|   | <b>Fluidness:</b> |   |   |   |   |

| Comments and Recommendations for Improvement |
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## 7. Objections After the Presentation

| A. I can't take my people out of production for the time it will take to meet with you.<br>• Rebuttal<br>– Tie-down |          |   |   |   |   |
|---|----------|---|---|---|---|
|   | 1        | 2 | 3 | 4 | 5 |
|   | Content: |   |   |   |   |
| Fluidness:  |          |   |   |   |   |

**Comments and Recommendations for Improvement**

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| B. My employees can't afford it.<br>• Rebuttal<br>– Tie-down |          |   |   |   |   |
|--|----------|---|---|---|---|
|  | 1        | 2 | 3 | 4 | 5 |
|  | Content: |   |   |   |   |
| Fluidness:   |          |   |   |   |   |

**Comments and Recommendations for Improvement**

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| C. I want to poll my employees to see if they are interested.<br>• Rebuttal<br>– Tie-down |          |   |   |   |   |
|---|----------|---|---|---|---|
|   | 1        | 2 | 3 | 4 | 5 |
|   | Content: |   |   |   |   |
| Fluidness:  |          |   |   |   |   |

**Comments and Recommendations for Improvement**

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| <b>D. We already have a plan in place with someone else.</b><br><ul style="list-style-type: none"> <li>• Rebuttal</li> <li>– Tie-down</li> </ul> |                   | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> | <b>5</b> |
|  | <b>Content:</b>   |          |          |          |          |          |
|  | <b>Fluidness:</b> |          |          |          |          |          |

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| <b>Comments and Recommendations for Improvement</b> |
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| <b>E. Feel, Felt, Found — Let me think about it/technique for other objections</b><br><ul style="list-style-type: none"> <li>• Rebuttal</li> <li>– Tie-down</li> </ul> |                   | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> | <b>5</b> |
|  | <b>Content:</b>   |          |          |          |          |          |
|  | <b>Fluidness:</b> |          |          |          |          |          |

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| <b>Comments and Recommendations for Improvement</b> |
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| <b>8. Section 125 Required Forms Packet &amp; Employee List</b> |  |  |  |  |  |  |
|---|--|--|--|--|--|--|

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|--|-------------------|----------|----------|----------|----------|----------|
| <ul style="list-style-type: none"> <li>• 2 signatures             <ul style="list-style-type: none"> <li>– Payroll Deduction Agreement</li> <li>– Application for Group Term</li> </ul> </li> <li>• Signed Employee List</li> <li>• Employee Engagement Process</li> <li>• Properly Completed Section 125 Required Forms Packet</li> </ul> |                   | <b>1</b> | <b>2</b> | <b>3</b> | <b>4</b> | <b>5</b> |
|  | <b>Content:</b>   |          |          |          |          |          |
|  | <b>Fluidness:</b> |          |          |          |          |          |

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| <b>Comments and Recommendations for Improvement</b> |
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