

## Worksite Process

1

**Qualify & Research Leads**

2

**Work the Lead** (Walk-Ins & Follow-Ups)

3

**Schedule Appointments**

4

**Complete Presentations**

5

**Close Cases**

6

**Enroll Employees**

7

**Service** (Quality)

## Worksite System

### Gatekeeper (30%-50%)

1. Rapport
2. Ask for Decision Maker (per script)
3. Disengage
4. Gatekeeper Questions (per script)

### Decision Maker (+33%)

1. Rapport (research)
2. Introduction to the Decision Maker (per script)
  - Tie-Down
3. Objections Before the Presentation (per script)
  - Tie-Down

### Presentation (+25%)

1. Rapport
2. Benefits Fact Sheet
3. Presentation (per script)
4. Closing Question (per script)
5. Objections After the Presentation

### Closed Case

- Signed Payroll Deduction Agreement
- Signed Group Term application
- Decision Maker initialed and completed the Employee Engagement Process Form
- Signed Employee List (Names & Hire Dates)
- Completed Section 125 Required Forms Packet
- Verification Call
- Announcement Letter/Poster
- Meet with Payroll Administrator and/or Owner
- Set appointment with Payroll Administrator to go over deductions after the enrollment.