



A success guide for ISI leads: learning from other advisors

<p>Arrive at your appointment</p>	<p>Do NOT call ahead. Simply show up. Cancellation rates increase when clients are called before appointments. These will count against your scorecard.</p> <p><i>Note: Successful advisors that are using ISI appointments who have chosen to initially ignore this advice have always come back to follow it.</i></p>
<p>Understand that clients have likely self-diagnosed</p>	<p>Using a Financial Needs Analysis will help determine if they are correct. It may also help uncover other needs.</p> <p><i>Note: Do not accept the named product requested as the ultimate sale. Clients often identify a product based on brand recognition or word-of-mouth referrals from people in situations similar to them, rather than on the basis of understanding the ‘best fit for their need’.</i></p>
<p>Identify the product solution</p>	<p>ivari and Specialty Life (SLi) offers a comprehensive product selection. Speak to your local Sales Director for more information or visit ivari.ca.</p> <p><i>Note: Don’t order-take. Offer the best solution to the diagnosis the client has done on themself. The client’s need and their perception of a product solution don’t always match up. Listen to the need, and explain product solutions that meet that need.</i></p>
<p>Implement the solution</p>	<p>Using electronic processes, implement a solution right away with ivari’s eApp or SLi’s i-app. Experienced advisors who have been successful with ISI leads have found that immediate business from the client is much higher if they start an application on the first appointment.</p> <p><i>Note: Remember that these clients searched online for insurance. They will expect and will be open to electronic processing for their application.</i></p>
<p>Always ask for referrals and warm introductions</p>	<p>The best revenue and deepest client relationships for successful ISI advisors have come from the second tier of business. Be confident enough to ask clients for referrals to family and friends who might benefit from the products and services you have to offer.</p>
<p>Finish your process by completing your ISI report</p>	<p>This will ensure you keep getting leads. Know your report options – reporting incorrectly will cost you future appointments.</p>

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