

Solution & recommendation

After completing the Discovery with your client and determining the best product solution, use these three talking points to help explain that solution in your next meeting.

Start with Why

What is it? Explain the product's structure and unique features. You might want to share a story of another client who bought that product and how it helped them.

What does it do? What does this mean to your client's unique situation and how can it provide an advantage to them.

Why is that important? During the Discovery, you heard what was important to your client and why it was important. Now, as you build your Solution, be sure to make it part of your Recommendation.



“Now that I have shown you the Solutions, do you see any reason not to move forward with the paperwork and setting the underwriting process in motion? Great! Let's get started!”

All objections are variations of these basic four types. Be prepared as you explain your Recommendation.