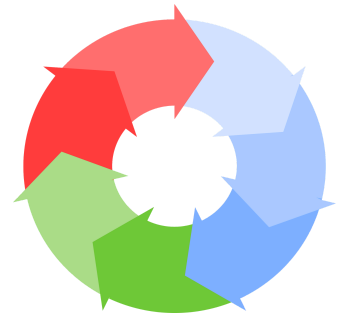




# 7 STEP PROCESS



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**7-STEP SALES PROCESS: EVERY TOP PRODUCER HAS A SYSTEM.**

**HERE'S A PROVEN ONE:**

- 1. APPROACH - WHETHER YOU'RE KNOCKING OR CALLING, YOUR OPENING MATTERS.**
- 2. WARM-UP - BUILD RAPPORT. TRUST WINS.**
- 3. NEEDS ASSESSMENT - FIND THE REAL NEED. DON'T SKIP THIS STEP.**
- 4. PRESENTATION - MATCH THEIR NEEDS WITH THE BEST PRODUCT.**
- 5. UNDERWRITING - ASK THE RIGHT QUESTIONS AND SELECT THE RIGHT CARRIER.**
- 6. CLOSE - ASK FOR THE SALE WITH CONFIDENCE.**
- 7. COOL DOWN & REFERRALS - FINISH STRONG AND ASK FOR INTRODUCTIONS.**

## **1. Approach**

First impressions set the tone. Be professional, confident, and clear about why you're reaching out. Your goal is to earn permission to continue the conversation.

## **2. Warm-Up**

Build rapport quickly and naturally. Ask a few genuine questions and listen. People buy from those they trust and like.

## **3. Needs Assessment**

This is the most important step. Ask thoughtful questions to uncover the real problem, not just the surface issue. Don't rush—clarity here makes everything else easier.

## **4. Presentation**

Present only what fits their needs. Keep it simple and relevant, focusing on benefits, not features. Show them how the solution solves their specific problem.

## **5. Underwriting**

Confirm health, eligibility, and details up front. Ask the right questions and pair the client with the right carrier to avoid surprises later.

## **6. Close**

Ask for the sale with confidence and clarity. Assume they're ready once their needs are met and questions are answered.

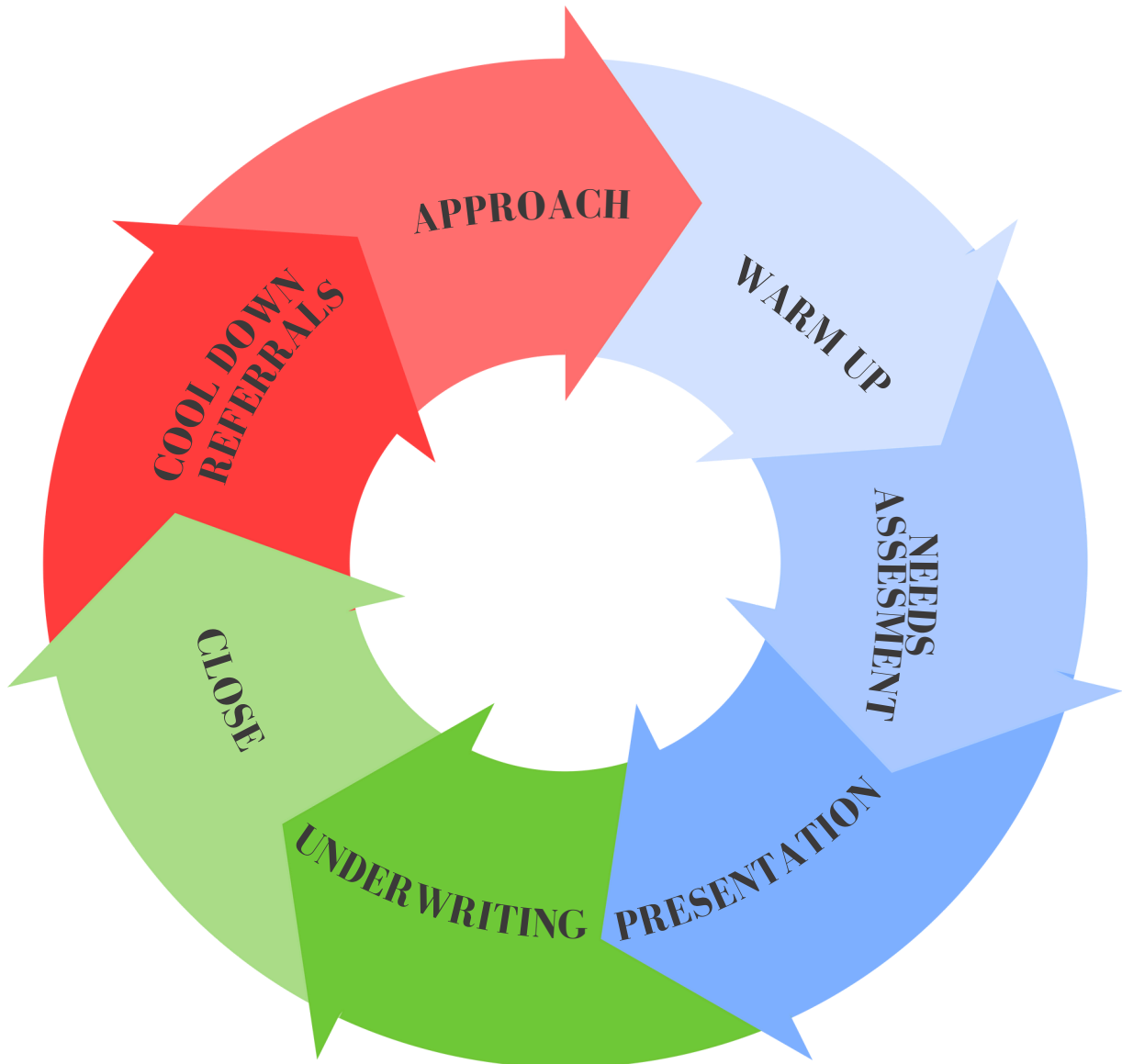
## **7. Cool Down & Referrals**

Reassure them they made a good decision. Set expectations for next steps, then confidently ask for introductions to others who could benefit.

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"Please note that the information provided here serves as general guidelines and should not be considered as fixed timelines for progress. Each individual's journey is unique, and personal circumstances, abilities, and experiences can significantly influence the pace of development. We encourage you to use this as a flexible framework and adapt it to your new agent's specific needs."



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