

Conservation is the process of helping the client understand that things may come up in the underwriting process, other agents may call them and try to replace your business with claims of lower rates, and that you are there to watch over them and take care of all their needs.

Conservation begins during the presentation. Incorporate phrases such as “I’ll always be your agent regardless of where you go,” and “It’s important for people to see who their agent/representative is, especially when you’re talking about something that lasts 30 years or more.”

After the application is complete, and also during policy delivery use phrases like “Remember I will always be your agent,” and “You have chosen a great product as well as a great company. If anyone ever tells you they have something better, or you get information that is in the mortgage protection or life insurance arena, just call me. That’s what I’m here for. Much like your tax professional, I am your insurance professional and will always be here to serve you and take care of your needs. I will review everything with you and for you, and make sure we do the right thing for you always.”