

Conservation is the process of helping the client understand that things may come up in the submission, approval or underwriting process with the policies, and other agents may call them and try to replace your business with claims of lower rates, but that you are there to watch over them and take care of all their needs and no one can provide better products or service than you can.

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 is as important as this protection for you and your family.”

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 health 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.”