

NAIFA MEMBERSHIP SALES SYSTEM DISCOVERY/FACT FINDER QUESTIONNAIRE



Meeting Host: _____ Meeting Date: _____

CONTACT INFORMATION

First Name	Middle Name	Last Name	Suffix
Friendly Name/Nickname	Designations	Title	
Business Name		Primary Company Appointment	
Business Address		City/State/Zip	
Work Phone	Mobile Phone	Date of Birth	Gender
Work Email		Personal Email	
LinkedIn Address	Facebook Address	Twitter Handle	

BUSINESS PROFILE

1. What are your practice specialties/areas of focus?

- Commercial Property & Casualty Insurance
- Personal Property & Casualty Insurance
- Life Insurance
- Health Insurance/Health Savings Accounts
- Medicare Supplements
- Disability Insurance
- Long-Term Care Insurance
- Group/Employee Benefits/Cafeteria Plans
- College Savings Planning (529)
- Estate Planning
- Business Succession Planning
- Fee-Based Planning
- Investments
- Retirement Planning (401(k), 403(b), 457, IRAs)
- Tax Planning
- Wealth Management

2. What year did you start in the business? _____

3. Why did you get into the business?

4. Why do you still do it/what drives you?

5. What do you like about it? _____

6. What's not so great about it? _____

7. Where do you see yourself in the next 3-5 years?
(Where will you be? What will your life be like?)

8. On a scale of 1 to 10 with 10 being the highest, where would you rate yourself as good at:

- a. Managing your time? _____
- b. Asking for referrals? _____
- c. Delegation? _____

9. What are the three biggest improvements that you are committed to making in your business?

- 1. _____
- 2. _____
- 3. _____

10. What are the three biggest roadblocks that are getting in the way of your success?

- 1. _____
- 2. _____
- 3. _____

11. Which one of the improvements that you want to make or roadblocks that you want to eliminate is the most important to you and why?

12. If you did not make this improvement or eliminate this roadblock, what would it cost you over the next 3 years? _____

13. If you made this improvement or eliminated this roadblock, how would your business or personal life be better?

14. How important would it be for you to get these results? Is it something that you should do, might do someday or something you must do?

15. If I had a potential solution for you, would you be interested in learning more? _____

PRESENT SOLUTION

Present NAIFA as the solution to their problem, sharing information and resources that demonstrate how NAIFA addresses their specific problem.

How does that feel/look/sound to you? (Trial close)

How much would it be worth to you if you absolutely knew that you were going to achieve the improvements you are committed to making...\$2,000? \$4,000? \$10,000? (Get answer.) _____

OR

Based on what I have told you, can you see the benefits of being a NAIFA member so that you can improve upon _____ and eliminate _____? (Get answer.)

Great! The investment in NAIFA is only \$_____ per month. Will that be Visa, MasterCard or American Express?

MEETING SUMMARY

NAIFA SOLUTION PRESENTED

- Time Management
- Prospecting
- Sales Ideas
- Other: _____

LIKELY TO JOIN

- Within the Next 30 Days 31-60 Days
- 61-90 Days > 90 Days Not Likely to Join
- Refused to Join/Do Not Contact Further
- (Reason): _____

FOLLOW UP/NEXT STEPS

- Joined/Begin On-boarding Process
- Schedule Meeting with Decision Maker
- Who: _____
- Phone: _____
- Schedule Follow Up Meeting
- (Date/Time): _____
- Refer to Another Member for Follow Up
- (Who): _____
- Other: _____

MEETING NOTES
