

# DISCOVER. DEFINE. DELIVER.



THE Insurance CENTER

## 01 PROSPECTING

- DD Scripts -

### Objectives:

1. Focus on having good conversations.
2. Create curiosity around the due diligence process.
3. Schedule a time to talk when we have developed interest in the buyer.

STAGE 1

02

## SETUP

- 8 Laps -

### Objectives:

1. Build rapport.
2. Learn more about the decision maker and their business.
3. Educate the buyer on the insurance game and the Due Diligence Process.
4. Close the prospect on participating in the Due Diligence Process.

STAGE 2

03

## RESEARCH

### Objectives:

1. Build rapport.
2. Discover pain, wants, & needs.
3. Define areas where we can improve the business.
4. Set the table for the presentation.

STAGE 3

04

## PRESENTATION

### Objectives:

1. Deliver our Due Diligence findings to the buyer.
2. Share areas where we can specifically help the business and improve their situation.
3. Present the next steps.
4. Confirm with the buyer how they want to proceed.

STAGE 4

05

## OUTCOMES

BOR

QUOTING

STAY IN TOUCH

FINAL