

## Client engagement begins with your representatives.

Today's empowered consumers are different. They want to work with people who truly understand their unique needs. And they want to work with people they trust. That trust is not easily gained, even with referrals. It requires authentic, caring language and courageous conversations that motivate today's consumers to act on their intention to secure their futures. Trustworthy Selling Professional helps your experienced financial professionals engage with more consumers to manage their financial needs.

## Your Representatives Will

- Understand behavioral finance — how today's consumers really make financial choices
- Incorporate small changes in language and technique to ensure greater client engagement
- Quickly build trust and develop stronger relationships with more consumers
- Execute courageous conversations with confidence
- Overcome self-limiting beliefs to take their business to the next level
- Prioritize clients to maximize time and capture cross-selling opportunities
- Grow premiums, policy counts, and clients

## Why it Works

- Anchored in LIMRA research and field-tested language and techniques developed by the Hoopis Performance Network
- New skills are mastered through practice, role play, application projects, and follow-up coaching
- Lessons are made memorable through the use of real-life case studies

- Content is easily incorporated into day-to-day activities with a language reference guide, demonstration videos, and other online resources

## Delivery

- Have it your way by delivering content in person – live or virtual; self-study; or just the modules you need to fill your training gaps.
- Completely turn-key learning system for company facilitators
- Materials available for live virtual classes and traditional/in-person classes
- Key resources and materials are accessible online from any device, including smartphones

## Course Outline

- The Trustworthy Selling Approach
- Understanding Today's Consumer and Market Opportunity
- Understanding and Adapting Your Sales Style
- Principles of Engagement
- Collaborative Discovery
- Gaining Commitment
- Deepening the Relationship
- Seller Psychology
- Trustworthy Selling Capstone & Action Planning

## Learn More

Find out how your agents can take sales to a new level:  
[info@trustworthysellingprogram.com](mailto:info@trustworthysellingprogram.com)  
[www.trustworthysellinginfo.com](http://www.trustworthysellinginfo.com)

**LIMRA developed Trustworthy Selling in partnership with the Hoopis Performance Network.**

# Course Content

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## The Trustworthy Selling Approach

This module introduces participants to the Trustworthy Selling model and approach, designed to emphasize process, not product, by engaging consumers on their terms. It requires a keen understanding of buyer psychology and behavior in the marketplace and awareness of how trustworthy behaviors directly affect the sales process and the quality of relationships with prospects and clients.

## Understanding Today's Consumer

This module focuses on the latest LIMRA research and provides agents with a deeper understanding of how consumers think about our industry's products and services and the way we communicate about them. The module addresses how to establish trust and decrease the procrastination so prevalent with consumers today.

## Understanding and Adapting Your Sales Style

Here, participants complete the Personality Styles Profile (PSP), which provides them with feedback on their unique selling styles. We address the behavioral styles agents find among consumers in the marketplace and provide practical ideas such as language, presentation skills, and more to help them adapt their styles during the sales process.

## Business Development Strategies

In this module, participants receive strategies for identifying target markets, as well as specific techniques, tools, and resources to help them penetrate those markets. We conclude with field-tested language proven to increase the quantity and quality of the referrals they receive.

## Engagement Strategies

This module focuses on the strategies and language to effectively engage prospects on initial contact. Agents learn how to overcome consumers' preoccupations and motivate them to engage in the sales process. The module includes telephone, face-to-face and digital engagement strategies.

## Collaborative Discovery

This module describes the benefits of engaging in courageous conversations with prospects and clients. We focus on the art and science of questioning to understand clearly the buyer's need. We introduce the RPM Questioning Model, providing a process to increase the sense of urgency and gain agreement to move forward.

## Gaining Commitment

In this module, participants receive best practices to help them effectively present their solutions. They also gain a practical understanding of the power of "story selling," as well as connecting the features, advantages, and benefits of their products and services during the close. We focus on LIMRA's behavioral economics research, proven to increase closing ratios by 29 percent.

## Deepening the Client Relationship

Through LIMRA research, participants gain a better understanding of the importance of continuing to develop the relationship with existing clients through consistent communication and leveraging cross-selling opportunities. Agents receive practical ideas on client segmentation, hear best practices in ongoing communication, and learn how to identify cross-selling opportunities with existing clients.

## Seller Psychology

The ninth module in the Trustworthy Selling curriculum addresses the psychology of financial professionals themselves. This includes a look at how top producers in the industry think about the business. In addition, the module addresses mental toughness and the psychology of peak performance that will help to motivate participants and increase their confidence.

## Trustworthy Selling Capstone & Action Planning

We conclude the program with the "Trustworthy Selling Capstone." This module summarizes, demonstrates, evaluates, and integrates the principles and practices presented during the Trustworthy Selling experience. Capstone is designed to make meaningful and relevant connections between the curriculum and the job behaviors expected of Trustworthy Sales professionals.