



TOP 10

THINGS TO ASK YOUR NEW LEADS

A Useful Reference Guide for Brokers

In order to help you get all the right information from your clients, AMWINS has created this list of the top questions you should be asking your new leads. Our goal is to help you secure every sale!

PLAN SPECIFICS

- Do you want to increase or decrease benefits?
- When does your group medical, dental and life coverage renew?
- What is the budget you are able to work with? (contribution level)

PREFERENCES

- What do you like and dislike about your current plan?
- Do you have previous service issues with any carriers?
- Are there any doctors or hospitals you really like and don't want to lose?
- What is most important to you and your employees about your medical plan?
(i.e. doctors, benefits, cost)

BUSINESS SPECIFICS

- Are there any medications or health concerns we need to know about?
- What type of company are you? (*corporation, sole proprietorship, partnership*)
- When did your business start and what documentation do you have to support the start date?

Use this checklist, together with the support AMWINS provides, to make your sales soar!