

Cross Selling:

Starting Jan 1, 2024, Gold Key is starting a new cross selling procedure and new business push.

We know many of you maybe already doing this, but we need everyone's support to help us grow from our current satisfied customers. This is essential for our business & staff long term future and growth.

If you communicate with a lot of different clients or deal with walk in ICBC clients, you should be able to produce 1 client per day.

From now we want to track and reward you for your results on any Client Referrals which will be sent to and they can assign the person that will follow up.

You can also handle yourself or assign to someone in your office if someone needs immediate service. In this case you should add name on New Client sheet or email

This is essential if you are dealing front ICBC clients or renewal lists.

Always offer other insurance products. General pitch: "If you would like any help with home, Auto , business , Travel or Life, Accident & Mortgage Insurance. We would love to help and get one of our experts to contact you or you can let me know anytime."

"We are offering a Mastercard Gift Card for all new Home or Business clients or if you refer us a client for Home or Business" (Not Auto). Limited Time offer

Copy and Paste below or on excel to send in your email.

We will track your results monthly and present the results. Everyone that has referred business that successfully has been bound will be rewarded with a bonus and tracked on a chart. The exact structure will be declared after month 1 of results.

You can use this link to send the information.

New Client Submission

FRONT DESK Submission: