



## Post-Sale App Introduction Script

### Turn Every Close Into Referrals & Retention

This NEPQ-based script helps you introduce the AgentForLife app to clients immediately after closing. In about 60 seconds, you'll get them set up, show them the value, and plant the seed for referrals — all while the excitement of their new policy is still fresh.

#### Part 1: Set Up the App (Right After Closing)

##### Transition:

"Alright [Client Name], before I let you go, I want to make sure you're completely set up. I have a quick app that's going to make your life way easier — takes about 60 seconds. Cool?"

[Wait for yes]

##### Download:

"Pull out your phone real quick. I'm going to send you a link to download the app — or you can scan this QR code."



Scan or tap to download

[Or text them the direct link]:

**iPHONE:** <https://apps.apple.com/app/id6757338138>

**Android:**

<https://play.google.com/store/apps/details?id=com.danielroberts.agentforlife>

"Got it? Tap that and hit Download. Let me know when it's installed."

#### Part 2: Explain the Value (NEPQ – Problem Awareness)

##### Surface the Problem:

"You know how most people, when they have a question about their policy six months from now, they have to dig through paperwork or emails trying to find their agent's number?"

[Wait for acknowledgment]

"And sometimes they just give up and call the 1-800 number and talk to a stranger who doesn't know their situation?"



[Wait]

## Present the Solution:

"This app fixes that. You open it, you see my face, you tap Call or Email, you get me directly. Your policy info is right there too – no digging."

## Confirm Value:

"Would it be helpful to have all that in one place instead of scattered around?"

[Wait for yes]

## Part 3: Get Them Logged In

"Okay, it should be downloaded. Open it up."

[Wait]

"You'll see a spot for a client code. Your code is [CODE]. Type that in and hit Sign In."

[Wait]

"Perfect. You see my picture there? That's how you know you're connected to me directly. Any time you have a question, need to make a change, or just want to check your coverage – this is the easiest way."

## Part 4: Plant the Referral Seed (NEPQ - Future Pacing)

## Transition:

"Now let me show you one more thing – takes two seconds."

"See that red button that says 'Refer [Agent Name]'?"

[Wait for yes]

## Situational Question:

"At some point, you're gonna be talking to a friend, a coworker, maybe a family member – and they're going to mention something about insurance. Maybe they're buying a house, having a baby, or just realize they're not protected. You know how those conversations come up randomly?"

[Wait for yes]

## Solution:

"When that happens, you don't have to remember my number or try to explain what I do. You just open this app, tap that red button, pick their name from your contacts, and it sends them a text introducing us – with my contact card attached. Takes five seconds."

## Confirm Understanding:

"Make sense?"

[Wait for yes]



## Future Pace + Ask:

"So who comes to mind right now – friend or family member – who might need to get their protection figured out?"

[If they name someone]:

"Want to send it to them now while we're on the phone together? Just tap that red button."

[If they hesitate]:

"No pressure at all. But when that conversation comes up – and it will – now you know exactly what to do."

## Part 5: Close Strong

"Alright [Client Name], you're all set. You've got my number, you've got the app, and you've got an easy way to send people my way when the time is right."

"Any questions for me right now?"

[Handle questions]

"Perfect. Welcome aboard. I'll be checking in with you [in a month / quarterly / etc.]. Talk soon."



# Quick Reference Cheat Sheet

Keep This Handy Until It Becomes Second Nature

STEP	WHAT TO SAY
1. Transition	"I have a quick app that makes your life easier – 60 seconds."
2. Download	"I'll text you the link."
3. Problem	"You know how people lose their agent's number and call the 1-800 line?"
4. Solution	"This app = my face, one tap, you get me."
5. Login	"Your code is [CODE]."
6. Referral Setup	"See the red Refer button? When a friend needs help, tap that."
7. Ask	"Who comes to mind right now who might need protection?"
8. Close	"You're all set. Welcome aboard."

## Pro Tips

- **Strike while the iron is hot** — Do this while still on the closing call. Momentum is everything.
- **Text the link** — Don't make them search. It's faster and ensures they get the right app.
- **Ask for the referral NOW** — They're most excited about their decision right after closing.
- **Help them send it** — If they name someone, walk them through sending the referral right then.
- **Keep it conversational** — This isn't a sales pitch. You're helping them get set up.



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