Life Insurance Sales Tips and Selling Techniques

The Roles and Responsibilities of a Life Insurance Agent

When working as an agent for a **wholesale life insurance brokerage**, you have several roles and responsibilities. Try to avoid focusing on just one of these roles. Instead, make an effort to be well-rounded in all of these roles, and you'll see the results with good commissions and a burgeoning clientele.

Educate Your Clients. As life insurance options have multiplied, clients increasingly need someone to educate them on the different types of policies available. When they understand the different types of policies, they can make informed decisions about what's best for them and their families. As you teach your clients, they learn to trust you and rely on your solid advice.

Paint the Big Picture. When selling life insurance, you have a responsibility to help your clients see the big picture. How will their life insurance policies fit their overall financial goals? Do they need to make adjustments to their policies because of financial or family related changes? As their life insurance agent, you can help answer these questions and resolve any concerns.

Be a Consultant. When making long-term financial decisions, most people like to consult with experts. Demonstrate that you are an expert in life insurance by sharing your expertise with them. Provide accurate facts and figures, and be available to speak with them any time they have questions. Increase your credibility by presenting charts and graphs specific to their personal financial situations, and stay current on industry trends and new information.

Be a Liaison. You are the connection between your client and the life insurance company or **wholesale life insurance brokerage** you represent. If your client has a problem with the company, be a liaison and try to figure out what the problems is. When you sell a policy and then disappear completely from your client's life, you lose credibility and future business from the client or from referrals. If a client has a simple question about billing or an address change, get involved and see what you can do to solve the problem or at least direct the client to someone at the company who can help. Such exemplary customer service proves to your clients that you care.

Be Thorough. When meeting a new client for the first time, refrain from recommending a particular policy too quickly, even if you're pretty sure it's the right one for them. Instead, ask a lot of questions in your initial interview to get a thorough picture of their needs, current financial situation, and future goals. Your effort shows your customer that you care about finding a policy that meets their specific needs.

Seek New Clients. To ensure future work for yourself, seek out new clients regularly. If you treat your current clients well, they will refer their friends and acquaintances to you. You can also look for new clients through newsletters, ads, door approaches, presentations at seminars and workshops.

Keeping these roles and responsibilities in mind can help you build a strong clientele when working for a **wholesale life insurance brokerage**. With the right approach your clients will come to trust you and depend on your good advice, all while you have the satisfaction of a job well done.

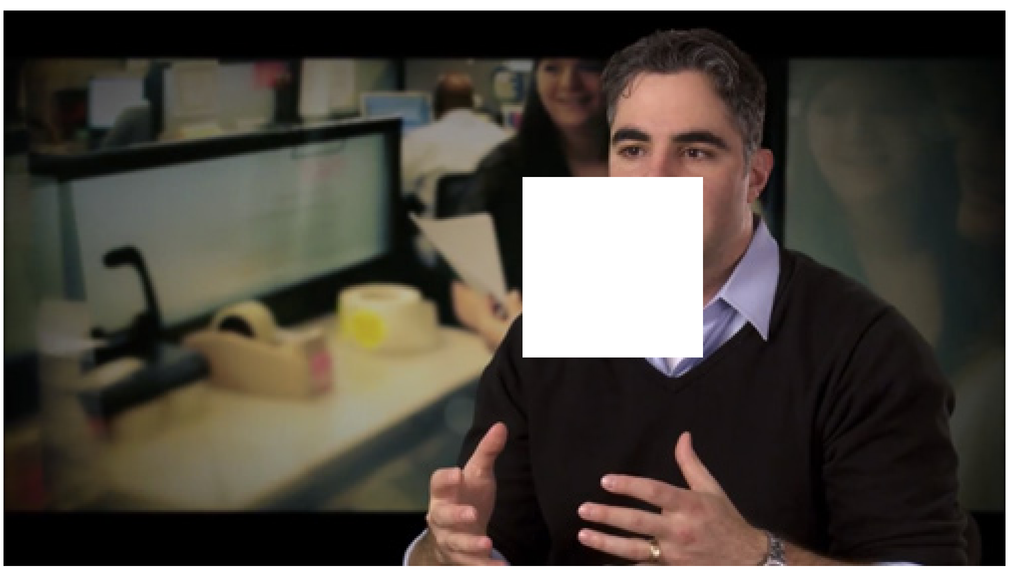
Tags: Life Insurance Sales Training, Insurance Broker Training, Life Insurance Broker, Wholesale Life insurance Brokerage, Business Management

About the Efinancial Wholesale Blog

From the best ways to approach your life insurance leads to the latest life insurance selling techniques, the Efinancial Wholesale blog is the premier online destination for agents across the country. We are constantly updating our blog with informative articles. Be sure to check back often to stay up to date on the life insurance sales tips and processes that get results.

You can subscribe to our blog via email on the right of this page. **Visit our site to learn more about our life insurance products.**

Who we are...



Get Started with Efinancial Today!

Subscribe via E-mail

Email*

Subscribe

Posts by category

- **Affordable Term Life Insurance (2)**
- **Agent Policy (1)**
- **Agent Training (7)**
- **ALISS (5)**
- **ALISS CRM (3)**
- **American General (1)**
- **Automated Sales (1)**
- **Become An Insurance Agent (2)**
- **Business Management (5)**
- **Case Management (2)**
- **Case Managers (2)**
- **Children's Life Insurance (1)**
- **Client Education (4)**
- **Closing the Sale (2)**
- **competitive edge (3)**
- **Dedicated Help (1)**
- **Efinancial (2)**
- **Efinancial Wholesale (5)**
- **Fidelity Life (1)**
- **Fidelity Life Products (2)**
- **Financial Planning (1)**
- **Insurance (3)**
- **Insurance Broker (1)**

- **Insurance Broker Training (8)**
- **Insurance Marketing Concepts (2)**
- **Insurance Sales Tips (17)**
- **Insurance Training (2)**
- **leading online wholesale broker (1)**
- **Leads Online (1)**
- **LIAM (2)**
- **Life Insurance (15)**
- **Life Insurance Awareness Month (2)**
- **Life Insurance Broker (8)**
- **Life Insurance Broker Training (13)**
- **Life Insurance Brokerage (6)**
- **Life Insurance Brokers (5)**
- **Life Insurance Leads (4)**
- **Life Insurance Marketing (5)**
- **Life Insurance Sales (22)**
- **Life Insurance Sales Training (15)**
- **Marketing Plan (4)**
- **More Customers (2)**
- **Online Insurance Sales (4)**
- **Producer Tip (5)**
- **Producers Tool Kit (1)**
- **Product Training (2)**
- **Referrals (2)**
- **Sales Contest (1)**
- **Sales Incentive (1)**
- **Sales Tips (7)**
- **Sales Training (6)**
- **Sell More (2)**

- **Selling Life Insurance (5)**
- **Smart Universal Life (1)**
- **Social Media (2)**
- **Term Life Insurance (9)**
- **Time Management (2)**
- **Tips (3)**
- **Tools to Succeed (7)**
- **top life insurance companies (1)**
- **top rated life insurance companies (1)**
- **Transamerica (1)**
- **Types of Insurance (1)**
- **Wholesale Life Insurance (4)**
- **Wholesale Life insurance Brokerage (7)**

Partnership Offerings

Call Centers

Independent Agents

Affinity Partners

Features & Benefits

Technology

Agent Training

Life Insurance Leads

VIP Program

Carrier Products

Carrier Suite

Resources