THE HAAKONSTAD GROUP
A Meeting of Minds

Worth Unlimited
Detailed Sales Process

The Worth agent's responsibility in the sales process is fairly simple – you merely get someone excited enough to run an analysis and then refer them over to Worth Unlimited. This document is designed to detail what to expect as you make your referrals to Worth Unlimited.

1. Use the Script
    a. Use the script provided by Worth (in your back office and on www.HaakonstadGroup.com website) to get someone interested enough to run an analysis
    b. **Keep it simple and do not sell or try to explain the program.** If the prospect continues to ask for details, remind them that the Worth Coach will be able to answer any and all questions and the first step is to gather information and set an appointment with a Worth Coach.
2. With the client present or on a 3-way call with you, call into Worth Unlimited – (800) 224-1053
    a. **Make sure the client prospect has their financial information with them when you call**
        i. Have them complete the Analysis Worksheet (in the back office) OR
        ii. Just tell them to have their most recent debt statements (mortgage, credit cards, auto loans, student loans, etc…) in front of them
    b. When Worth answers the phone, you will give them your name, agent ID, let them know you have someone interested in running an analysis, and then introduce the client prospect
    c. The Worth Coach will address the client and get general information from the prospect: Name, address, email, phone number, and set the appointment
        i. Write down the appointment time – you will need to call and remind the client of the appointment the day before the appointment
    d. Once the appointment is set, you may dismiss yourself from the phone call*. However, if you have done a 3-way call into Worth with the prospect, then you will disconnect the line between Worth and the prospect when you hang up.* If this is the case, when you dismiss yourself from the phone, let the Worth Coach know that you did a 3-way call and have the Coach call the prospect back to gather their financial information.
3. Call the client prospect the day before the appointment to remind them of the appointment
4. Worth Coach will call the client at the designated appointment time (at the number provided during the initial phone call)
    a. You do NOT need to be on the call
    b. Client prospect will need to be in front of a computer in order to participate virtually in the meeting through GoToMeeting – the Worth Coach will provide the meeting ID number and help the client log in to the meeting
    c. The Worth Coach will go through the analysis results, the program, and answer any questions the prospect may have
    d. Worth Coach will close the sale

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5. Call the client prospect after the appointment to see how the appointment went
    a. Ask about their interest savings and time savings
    b. Ask what they liked best about what they heard
    c. Ask for referrals!
6. You get paid!
    a. Once the client invests in the program, you will be paid either with a check mailed to you or direct deposit (direct deposit forms in the back office)
    b. Base commission is paid out weekly
    c. Monthly bonus commissions (based on your personal sales volume for the month) is distributed monthly

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