

NEWS you can USE

To Help Members Buy! A bi-weekly newsletter

May 2, 2025 Vol 2, Issue 8

SALES INSIGHTS

PROBING QUESTIONS

How do you prepare for a meeting with a member? Asking members the right questions at the right time and to the right audience is crucial to ensure you identify high quality opportunities as early as possible in the sales process.

While there is no finite [list of probing questions](#), there are many standard questions you should always have in your “back-pocket” and be prepared to ask if and when it makes sense to do so. Listening is just as important as asking questions, so you know which question to ask next. Whichever questions you choose to ask, all probing questions should have the following traits in common.

- Strategic and open-ended
- Intentional to uncover the member’s pain points, goals and needs
- Based on your audience and asked at the right time
- Uncover what the members themselves haven’t thought about
- Create urgency to take action

HAVE A PLAN!

KNOW YOUR STRENGTHS!

KNOW YOUR AUDIENCE!

SALES LEADERBOARD

As of 5-2-25	Applied	Assessments	AML	Designations	Facilitated	Industry	Trustworthy	Total	Total in
Sales Team	Research			(281/291)	Learning	Advantage	Selling	Closed Won	Contracting
South	\$70,000.00	\$21,500.00	\$3,189.00	\$11,200.00	\$66,448.00	\$0.00	\$21,125.00	\$193,462.00	\$144,900.00
Great Lakes	\$144,000.00	\$0.00	\$0.00	\$0.00	\$29,250.00	\$6,900.00	\$0.00	\$180,150.00	\$189,085.00
West	\$30,000.00	\$0.00	\$0.00	\$13,375.00	\$0.00	\$2,300.00	\$0.00	\$45,675.00	\$25,000.00
Life Insurers Council (LIC)	\$0.00	\$0.00	\$0.00	\$0.00	\$45,000.00	\$0.00	\$0.00	\$45,000.00	\$850.00
Northeast	\$30,000.00	\$3,225.80	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$33,225.80	\$132,990.00
Canada	\$0.00	\$8,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,000.00	\$0.00
Workplace Benefits (WPB)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$274,000.00	\$32,725.80	\$3,189.00	\$24,575.00	\$140,698.00	\$9,200.00	\$21,125.00	\$505,512.80	\$556,127.00

*Credit and thanks to Chris Atkins for this clever grid that we repurposed as our new Leaderboard!

**Designations: this number only includes 281/291 reported as CIF in the CRM; total designation revenue reporting is pending

COMING SOON!

Committee Presentations

Will be added as a picklist option when logging activity (under “Benefits & Sales”)

Reminders & Updates:

BatchGeo: Thanks to Nancy and Renae, each Team now has a [personalized map of your territory](#) to support your travel plans.

MBR Update: Annuity Compass and Life Compass will now show correctly in the Research Participation section.

Logging Activity: please remember to add the “prioritized solution(s)” targeted in those types of conversations, or that activity will not get reported in the “Prioritized Solutions” reports.

Did You Know?

[May’s Monthly Content Feeder](#)

is now available. Stay well informed and explore important updates on new research, campaigns, events.

RESEARCH:

[2025 Barometer Study \(final\)](#)

just back from our designers, the final version is ready for use with members.

[Dave’s Life & Annuity](#)

[Conference presentation](#) is available for your perusal and use with members as appropriate.

[Individual Life Forecast](#)

[Webinar](#) (PPT), by Bryan Hodges & Karen Terry on 2/11/25.

- These slides provide great content plus speaker notes to help you craft your presentations as appropriate

PRODUCT

[IA Heat Map – Month by Month](#)

is now available where each month is consolidated in one document. Please review on a regular basis to inform your sales planning and outreach efforts.

MARKETING

An updated IA sales story and two second sales presentations have been drafted and are currently under review.

Promotion for our upcoming [Trustworthy Selling thought leadership webinar](#) scheduled for June 5th will start the week of 5/5. Sales scripting coming soon.

[Previous Issues, Feedback & Ideas](#)