# Field Assessments Selling Lead Sheet:

With the endless opportunities we have in our offering, capturing high-quality leads is the key to our success. This lead sheet will help identify opportunities that can be turned into sales revenue for LIMRA and LOMA.

This lead sheet is yours to use and will arm you with the questions to ask and the knowledge to gather to identify a potential lead for the Field Assessment product line. After you complete this sheet, please forward it on to Ben Pharr who will work on product recommendations and pricing options for the member company.

When speaking with a person and the topic of recruiting strategies, retention challenges, goals and needs arise, capture the following information:

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| --- | --- |
| Their Name: |  |
| Company Name: |  |
| Contact Information: | Email:  Phone: |
| Date of Conversation: |  |

The following provides questions that can be asked to see if there is an opportunity to speak further about what our Field Assessment products can do to support their recruiting and retention strategies.

Say; “***With your permission, I would like to ask you a couple of questions about your hiring, onboarding, and retention needs. I know some of these questions may be a bit difficult to reply to, I am just asking from a general sense. And, if you feel as though someone else on your team may be able to answer these questions more thoroughly, we would be happy to speak with them.***”

**Ask and listen for:**

Note: You can use the “Listen for” responses as probes if you feel you are not getting direct information.

| **Ask:** | **Listen for:** |
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| 1. Overall, how would you best describe your organization’s hiring needs? | * Hiring new advisors/agents * Internal hiring/promotion for field leadership * Hiring agents who will be required to pass licensing exams |
| 1. What are your hiring goals for this year? | * <500 new advisors/agents per year * Between 500 and 1,999 new advisors * Between 2,000 and 3,499 new advisors * Between 3,500 and 4,999 new advisors * >5000 new advisors/agents per year |
| 1. What are the pain points in your organization’s hiring/recruitment? | * Finding candidates who can pass regulatory exams * Finding candidates who are a good organizational fit * Finding candidates who are looking for a stable organization where they can work long-term * Finding new sales candidates who can survive past 1 year * Finding new sales candidates who have potential to be high producers |
| 1. Are you currently using or have you used assessments for sales or development in the past? If so, what was the outcome? | * Currently using * Have used in the past * Why did you stop use? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * How did you feel about assessment usage? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 1. What knowledge, skills, abilities, or other attributes are you looking for in an ideal candidate? | * Financial services experience (SuccessPredictor) * Natural market (SuccessPredictor) * Ability to pass licensing exams (PSI) * Customer focus (ServiceFirst) * Leadership aptitude (FLP/LeaderPersona) * Collaborative work/teaming (CollaboRate) * Personality makeups and motivators (SalesPersona) * Candidate trainability (LearningStyles) * Candidate’s workstyle preferences, motivators, concerns, and expectations (CareerView) |
| 1. How much effort does your organization put into recruiting and onboarding? | * High effort * The organization pays for study materials/time/exams * The organization is actively recruiting (job boards/LinkedIn/job fairs, etc.) * Low effort |
| 1. Has your organization established a budget for hiring initiatives this year? | * Yes: how much? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * No |
| 1. Are there any other considerations or challenges you’d like to mention? | * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| Name of person and contact information for who may be able to answer these questions more thoroughly: |  |

IF A NEED IS IDENTIFIED, Say; ***“With your permission, I would like to share this information with Ben Pharr, one of my coworkers who manages a product line that can meet your needs. I will support Ben and coordinate a time for us all to discuss further and help identify resources you may leverage to help meet your organization’s goals.”***

IF NO NEED IS IDENTIFIED, Say; ***“Thank you so much for answering these questions. I am happy to hear of the success your recruiting department is experiencing and am here to support you with any needs you may have in the future when it comes to recruiting strategies and challenges. I am here to be a resource for you and your team.”***

Please remember to forward on this lead sheet to Ben Pharr at [bpharr@loma.org](mailto:bpharr@loma.org?subject=Lead%20Sheet). Thank you!